

C4740-1-11
AN IRVING-CLOUD PUBLICATION

JobberTopics®

JULY 1985/Price \$35.00

51st ANNUAL MARKETING DIRECTORY ISSUE

FOLLOW THE SIGNS

- ★ Of direct interest to
all **EXECUTIVES**
- ✎ "Must" reading
for outside
SALESMEN
- ⊙ Not to be missed
by **COUNTERMEN**

- Ⓜ For those concerned with
MACHINE SHOP
- ⚠ For those interested in **RETAIL
SALES**

Features

★ ⊙ Ⓜ	SEES ECONOMIC GROWTH OF 3.5-4%	20
★ ⊙ Ⓜ	TRUCK UPSURGE GOES ON IN 1985	44
★ ⊙ Ⓜ	ECONOMY'S 'HICCUPS' COULD END	59
★ ⊙ Ⓜ	HOW'S BUSINESS? MIXED REPORT	62
★ ⊙ Ⓜ	JOBBER COMPUTER GROWTH ONGOING	68
★ ⊙ Ⓜ	MULTI-LINES GOOD RETAIL TACTIC	72
★ ⊙ Ⓜ	WHAT TO KNOW ABOUT RCRA RULES	78
★ ⊙ Ⓜ	QUANDARY: WHICH CARS TO BUY?	84
★ ⊙ Ⓜ	WASHINGTON OUTLOOK RATHER DIM	86
★ ⊙ Ⓜ	STRENGTH IN INDUSTRY'S FUTURE	88

Departments

20 Years Ago	10
How's Business	16
Business Review	18
Cloud-Bursts	28
Coming Events	30
News Panorama	33
Detroit Digest	38
Truck World	44
Noted in Washington ..	51
Entree	56
New Products Report ..	100
Tool Topics	105
Sales Aids	112
Tech Fax	126
Pictorial Report	127
People on the Move ...	154
Manufacturers News ...	168
Clinic-ally Speaking ...	172
Jobberwise & Otherwise	178
Association News	180
Advertisers Index	225

'How's Business' Query Brings Mixed Signals From Jobber Panel

In sales, collections and cash position, the picture is not as cheerful as it was a year ago. But it may be only a 'correction' swing following post-recession upturn . . .

By **BILL ELLIS**
Managing Editor

Like the airplane pilot who gets a quick reading on his aircraft by scanning his instrument panel, **JOBBER TOPICS** gets a quick reading on the aftermarket each year by canvassing its "How's Business" reporting panel to ask, well, "How's Business?"

The airplane pilot of course wants to know his altitude, speed, direction of travel and suchlike. But we zero in on such things as dollar and unit sales, cash position, collections and other items.

Month by month, we do a *quickie* How's Business checkup, to see whether sales and collections were good, fair, or poor. But in this annual How's Business canvass we dig a little deeper, and sift reported information into more categories. The monthly survey, to cite another difference, compares a given month's business with the previous month. The annual study, however, compares the entire first quarter with the first quarter of the prior year. In both cases, figures are



Ellis

computed for both the country as a whole and nine census regions of the country.

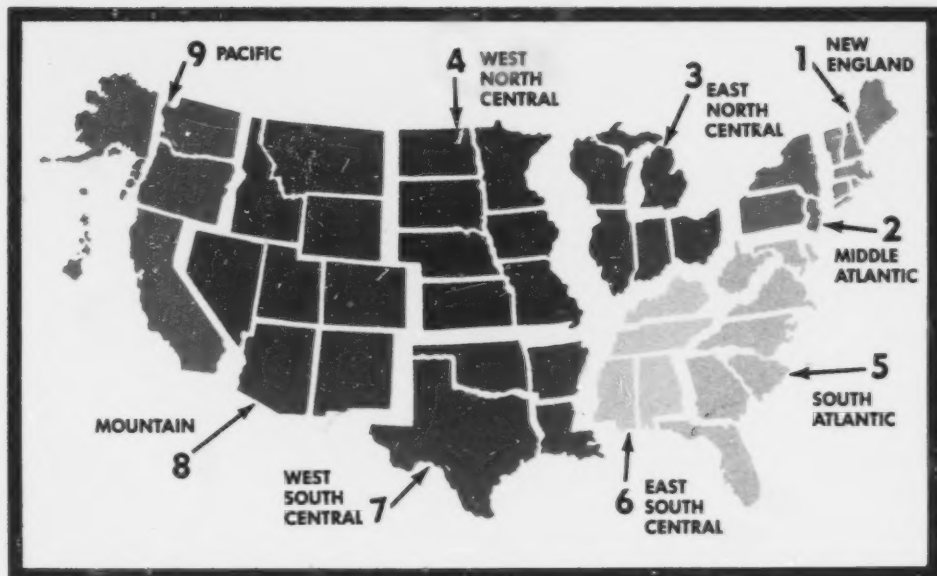
"And so," the reader at this point is probably asking, "what did you learn this year? How did the aftermarket shape up?"

The aftermarket in all truth, didn't ring as many bells this year as it did last. Maybe we're in what Wall Streeters like to call a correction mode, the offsetting swing that often follows a stock market rally. Whatever, the digital signs weren't nearly as bright and cheery as they were in '84, when the flight from recession was a fresher experience.

Wide discrepancies

Dollar sales, that barometer that everyone can relate to, are as good a place to start as any. Of the survey group (151 jobbers), 36.4 percent said sales were up; 42.4 percent reported them down; and 21.2 percent said they were the same. From region to region, of course, there were wide discrepancies. But, the laws of math being what they are, the strong "ups" were all counterweighted by strong "downs."

If sales were up, jobbers were asked, what was the average increase? The answer: 11.5 percent. And, if down, came the balancing question, what was the average decrease?



The answer to that was 10 percent.

To get another fix on volume, and rule out the distorting affect, if any, of inflation, we also asked about unit sales—the physical units, of spark plugs, batteries, belts and filters, etc., taken as a whole.

Only one out of four jobbers—25.2 percent—said sales were up. The number reporting them down was 37.1 percent. Slightly over 32 percent said sales were the same and just over 5 percent gave no answer. Appended to a questionnaire from Minnesota was this comment: "We have to do everything differently to keep sales up to what they are now. The cream is gone from the auto parts business . . ."

As we did in dollar sales, we asked respondents to give the average sales movement, whether up or down. The average "up" movement was 10.3 percent, and the "down" movement was 12.7 percent.

Hitchhiking on our sales questions, both dollars and units, we asked this question: "If sales were up, which class of trade contributed most to your increase?" Repair shops

came off as the No. 1 choice, garnering a 12.6 percent response. The other selections were: service stations, 6.6 percent; do-it-yourselfers, 6.0 percent; and car dealers, 3.3 percent.

Collections, that all-important part of the selling cycle, appeared much as they did in our 1984 "How's Business" survey. Nearly 59 percent said collections were the same as they were in the corresponding period of the previous year. Another 13.2 percent said collections were up while 27.2 percent reported them down.

'Changing attitude' on credit

A Texas jobber suggested that slow-paying commercial accounts might be affected by the same "changing attitude" about credit that's shown, he said, by many retail customers. "It seems, claimed the jobber, "that customers are using their money for more recreational activity and luxury items instead of taking care of their financial responsibilities . . ." (Consumer debt—in February—stood at \$620 billion.)

Compare the first three quarters of 1985 with the first three months of 1984

(Percent total respondents)

	Reg. 1	Reg. 2	Reg. 3	Reg. 4	Reg. 5	Reg. 6	Reg. 7	Reg. 8	Reg. 9	All Regions
Up	17.7	31.8	25.9	6.7	20.0	30.1	7.9	14.2	32.3	25.2
Down	33.2	32.4	22.2	60.0	35.0	16.7	57.1	57.1	8.3	37.1
Same	50.0	15.8	44.5	33.0	30.3	21.9	21.4	28.6	18.7	32.4
No answer	0.0	0.0	7.4	3.3	5.0	0.0	14.3	0.0	12.5	5.3
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Average percent "up"	n.a.	9.2	13.5	13.3	n.a.	7.4	n.a.	n.a.	9.8	10.3
Average percent "down"	n.a.	10.0	11.0	10.0	n.a.	5.0	n.a.	n.a.	9.0	10.0
Average percent "same"	n.a.	11.7	15.5	12.2	n.a.	n.a.	12.0	n.a.	n.a.	12.7
Median percent "down"	n.a.	10.0	12.5	10.0	n.a.	n.a.	6.5	n.a.	n.a.	10.0

In Question No. 5 of our study, we asked respondents to give a "better," "worse," or "about the same" report on their cash position. Only 20.5 percent said it was better while 22.5 percent claimed it was worse. That left 57.0 percent who reported it about the same. A South Carolina wholesaler said his cash position had been hurt by his decision to add a new roof and refinish his store's outside walls. But, he added philosophically, the upgrading did "improve the plant."

We finally asked our How's Business panel to tell us not about their own businesses but about the general economic climate in their trading areas. The 151 respon-

dents, located in urban, suburban and rural communities and scattered in all 50 states, probably gave a fairly true reflection of just where the nation itself stood, economically, in the first quarter of 1985. One quarter of the jobbers—25.2 percent—said conditions were improving. Of the others, 28.5 percent said times were getting worse and 46.3 percent reported them about the same.

Brief look at each region

To bring this report closer to our readers—to where they live and do business—we will now take a brief look at survey readouts for each of the nine census regions. As stated earlier, there were wide discrepan-

	Reg. 1	Reg. 2	Reg. 3	Reg. 4	Reg. 5	Reg. 6	Reg. 7	Reg. 8	Reg. 9	All Regions
Up	17.7	31.8	25.9	6.7	20.0	30.1	7.9	14.2	32.3	25.2
Down	33.2	32.4	22.2	60.0	35.0	16.7	57.1	57.1	8.3	37.1
Same	50.0	15.8	44.5	33.0	30.3	21.9	21.4	28.6	18.7	32.4
No answer	0.0	0.0	7.4	3.3	5.0	0.0	14.3	0.0	12.5	5.3
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Average percent "up"	n.a.	9.2	13.5	13.3	n.a.	7.4	n.a.	n.a.	9.8	10.3
Average percent "down"	n.a.	10.0	11.0	10.0	n.a.	5.0	n.a.	n.a.	9.0	10.0
Average percent "same"	n.a.	11.7	15.5	12.2	n.a.	n.a.	12.0	n.a.	n.a.	12.7
Median percent "down"	n.a.	10.0	12.5	10.0	n.a.	n.a.	6.5	n.a.	n.a.	10.0

Compare the first three months of 1985 with the first three months of 1984.

(Percent total respondents)

Dollar Sales	Reg. 1	Reg. 2	Reg. 3	Reg. 4	Reg. 5	Reg. 6	Reg. 7	Reg. 8	Reg. 9	All Regions
Up	16.7	42.1	40.8	16.7	45.0	58.3	14.3	14.2	65.8	36.4
Down	33.3	42.1	22.2	70.0	30.0	25.0	78.6	42.9	25.0	42.4
Same	50.0	15.8	37.0	13.3	25.0	16.7	7.1	40.9	6.2	21.2
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Average percent "up"	n.a.	10.2	15.2	10.8	9.6	9.9	n.a.	n.a.	10.3	11.5
Median percent "up"	n.a.	10.5	11.0	10.0	9.0	8.0	n.a.	n.a.	12.5	10.0
Average percent "down"	n.a.	10.6	15.3	12.8	9.8	n.a.	15.9	n.a.	n.a.	12.8
Median percent "down"	n.a.	10.0	16.0	10.0	9.0	n.a.	10.0	n.a.	n.a.	10.0

cies from region to region, reflecting no doubt such things as the farm problem, the recovering auto industry, the export/import situation, and the upbeat of the housing industry. We will comment briefly on each region, highlighting those statistics which give a quick "snapshot" of how things are.

The nine regions and the states they represent are as follows:

Region 1 (New England): CT, ME, MA, NH, RI and VT.

Region 2 (Middle Atlantic): NJ, NY and PA.

Region 3 (East North Central): IL, IN, MI, OH and WI.

Region 4 (West North Central): IA, KS, MN, MO, NE, ND and SD.

Region 5 (South Atlantic): DE, DC, FL, GA, MD, NC, SC, VA and WV.

Region 6 (East South Central): AL, KY, MS and TN.

Region 7 (West South Central): AR, LA, OK and TX.

Region 8 (Mountain): AZ, CO, ID, MT, NV, NM, UT and WY.

Region 9 (Pacific): AK, CA, HI, OR and WA.

Now, let's begin our analysis of the nine regions.

Region 1 (New England)—Auto parts jobbing in New England did not, most assuredly, present the brightest picture in the country. But it did not, at the same time, present the darkest picture either. The breakout computation showed that not quite 17 percent of the jobbers said dollar sales were up. That left 33.3 percent who said sales were down and 50.0 percent who reported them the same. Not much cause for celebration, but there was even less cause in some other regions. New England, alone among the nine regions, had no jobbers reporting increased collections. At the same time, however, it had only 16.7 percent reporting collections down and 83.3 percent reporting them the same. The latter figure exceeded that of any other region.

Region 2 (Middle Atlantic)—Compared to the country as a whole, the Middle Atlantic looked good in quite a few respects. Of the Region 2 sampling, 42.1 percent said dollar sales were up; 31.6 percent reported a unit sales gain; 15.8 percent said collections had risen, and 31.6 percent (more than any other region) said their cash position was better. How about the jobbers local economies? There things were somewhat soft.

Percent total respondents											
	Reg. 1	Reg. 2	Reg. 3	Reg. 4	Reg. 5	Reg. 6	Reg. 7	Reg. 8	Reg. 9	All Regions	
Reported gains	16.7	21.1	11.1	3.3	10.0	25.0	14.3	5.0	2.5	12.8	
Service volume	16.7	15.6	3.3	5.3	5.0	8.3	6.9	0.0	15.6	6.3	
Debt collections	16.7	5.3	14.3	0.0	5.0	8.3	0.0	14.3	0.0	10.0	
Cash position	0.0	0.0	0.0	3.3	5.0	8.3	0.0	0.0	18.8	3.3	
Other	0.0	0.0	7.4	5.4	0.0	8.3	0.0	25.9	0.0	4.5	
Percent reporting sales "up"	16.7	42.1	40.6	16.7	45.0	58.3	34.3	14.3	68.8	36.4	
Percent reporting sales "down"	33.3	42.1	22.2	70.0	40.0	25.0	78.6	42.9	25.0	42.4	
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	

*Totals over 100 percent due to multiple mentions.

Only 21.1 percent (vs. the national figure of 25.2 percent) said conditions were improving.

Region 3 (East North Central)—In this industrialized area, where a banking crisis in one state, Ohio, temporarily closed 69 savings and loans last March, the signals were mixed. Jobbers reporting gains in dollar sales put Region 3 just above the national average. Unit sales were virtually at the national average, and the number of jobbers reporting increased collections, 11.1 percent, were below the national average. Sizing up conditions in their local trading areas, 59.3 percent of the panel saw the picture unchanged. Just over 22 percent saw conditions improving while 18.5 percent

saw them getting worse.

Region 4 (West North Central)—The nation's farm problems, including a debt burden of \$200 billion, declining assets, shrinking exports, and an alarming number of farm foreclosures, probably impact this wheat-belt area more than any other part of the country. It is not surprising then that the jobber picture is correspondingly dim. Dollar sales? Only 16.7 percent said they were up. The unit sales figure, 6.7 percent, was the lowest in the nation. Jobbers reporting improved collections or cash positions were also a small minority, as were those saying their local economies were any better. A survey return from a Kansas jobber included this comment: "Unless farmers in

Comparing the first three months of 1985 with the first three of 1984, are economic conditions in your area improving, getting worse, or about the same?										
(Percent total respondents)										
	Reg. 1	Reg. 2	Reg. 3	Reg. 4	Reg. 5	Reg. 6	Reg. 7	Reg. 8	Reg. 9	All Regions
Improving	16.7	21.1	22.2	16.7	30.0	41.7	28.6	28.6	31.3	25.2
Getting worse	33.3	36.8	18.5	53.3	15.0	16.6	35.7	28.6	6.2	28.5
About the same	50.0	42.1	59.3	30.0	55.0	41.7	35.7	42.8	62.5	46.3
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0



our area receive help real soon, everything is going to go to pot. It's worse than I have seen in my 35 years in business."

Region 5 (South Atlantic)—"We expect 1985 to be better than 1984, and 1984 was good. Collections were slow but they're coming in. The outlook is good." The South Carolinian who penned those lines pretty well summed up things in the South Atlantic, as well as in his own company. Jobbers giving "up," "better," or "improved" reports, depending on the category, were as follows: dollar sales—45.0 percent; unit sales—20.0 percent; collections—10.0 percent; cash position—30.0 percent, and improved economic conditions—also 30.0 percent. Some figures, admittedly, were on the low side, but they were balanced by ones on the high side.

Region 6 (East South Central)—The second best "performer" in three of five survey questions was Region 6. Of that jobber group, 58.3 percent said dollar sales were up, 50.0 percent reported unit sales up, and 25.0 percent advised that collections showed improvement. Interestingly, a size-

able 25.0 percent of the jobbers said repair shops contributed most to their sales increase—a figure equalled in only one other territory. Nearly forty-two percent said local economic conditions were picking up.

Region 7 (West South Central)—The low level of inflation expected during 1985 (3.6 percent) is not being bought without a price, and that price is being paid, in part, by the somewhat becalmed oil industry. All of which explains some of the low readings in Region 7, whose Texas-Oklahoma countryside bristles with thousands of oil derricks. Of the West South Central jobbers, only 14.3 percent reported dollar sales up. Unit sales? There the "up"-reporting jobbers were even fewer: 7.2 percent. Although a paltry 14.3 percent of the panel said collections were better, a healthy 28.6 percent had more cash in hand. Thanks partly to rising gas prices, this region may be pulling out of its doldrums. Asked about local economic conditions, a substantial 28.6 percent said things were looking up.

Region 8 (Mountain)—"There have been
(Continued on page 95)

'How's Business' . . .

(Continued from page 67)

layoffs of about 9,500 in a three-county area with a population of 200,000." That grim intelligence from a Colorado jobber helped explain the anemic performance of this region. Dollar and unit sales improvements were reported by just over 14 percent of the jobbers. The collection-to-cash position picture was a direct reversal of the finding in Region 7. In Region 8, 28.6 percent of the panel reported better collections but only 14.3 percent said their cash was better off. To the question about local economic conditions, 28.6 percent said they were generally

on the upswing.

Region 9 (Pacific)—The sales champ of the various regions, by a country mile, was Region 9. Of jobbers there, 68.8 percent said dollar sales had advanced, and 62.5 percent gave a like report on unit sales. Collections, again, seemed "out of synch" with cash position. While only 18.3 percent said collections were better, 31.3 percent said their cash was up. Economic conditions in Region 9, despite the recent woes in Silicon Valley, seemed fairly bright. Over 31 percent said things were improving. **JD**

Big "E" To Be Every Two Years, Starting in 1988

Plans have been made public to shift frequency of the Big "E" Show from every three years to every two years.

Since its inception in 1970, the Big "E"—the Eastern Automotive Aftermarket Show—has been on a three-year cycle. That pattern will end starting with the Big "E" scheduled for 1988. Thereafter, at least through the year 2000, the show be an every-other-year event.

The show location will be somewhat varied also. Atlantic City will continue to be a favored site, but the show will also travel to other towns. Being considered are such cities as Atlanta, Washington, Philadelphia, and Dallas.

The Big "E" changes were revealed at an Atlantic City press conference last April, and a press conference in late 1984, both sponsored by the show's Joint Operating Committee.

Future Big "E" Shows will dovetail with "International" Shows held in Chicago and Las Vegas, shows which are now, also, in a two-year pattern. When the International Shows are in Chicago, and called Big "I," it

will be an off year for the Big "E," with no show held. But when the International Shows are in Las Vegas, and called International Automotive Aftermarket Shows, it will be an "on" year for the Big "E," with the show being held in Atlantic City or elsewhere.

Groups to promote U.S. exhibits in London show

ASIA, MEMA and the Overseas Automotive Club are encouraging participation by U.S. firms in the Automotive Trade Show, which will take place September 22-27 in London, England, at the Earls Court Exhibition Complex.

Show officials say there will be products from 31 countries in the exhibit.

Automotive Trade Show is an amalgamation of three former shows: the SMMT/Garage Equipment Association's Autoquip and Garagequip Shows, and the Vehicle Builders and Repairers Association's BodyShop Show.

1985

AUTOMOTIVE STATISTICS

INDEX TO THE STATISTICAL SECTION

Automobiles (See Cars)		Failures by Year	45-S
Automotive Heavy Duty		How They Advertise	25-S
Distributor		How They Fight Retail	
Productivity of Staff	37-S	Competition	47-S
Sales, Profit, Asset		Inventory	
Measures	36-S	Management	17-S
Automotive Manufacturers		Key Business Ratios	15-S
Financial Ranking	34-S, 35-S	Leading Merchandise	
MEMA Members' Sales		Items	11-S
Forecast	33-S	Leading Product	
Automotive Production		Groupings	12-S
Rebuilders, Number of	5-S	Major Size Wholesalers	4-S
Automotive Repair		MEMA's "Composite"	
Facilities,		Wholesaler	32-S
Number of	5-S	Operating Costs	
Automotive Repair Shops		as Percent of	
Number of	5-S	Gross Margin	12-S
Parts, Service Sales	5-S	Outlets by State	6-S
Total Service &		Payroll Costs as	
Parts Market	5-S	Percent of Sales	11-S
Automotive Warehouse		Percent Holding	
Distributors		Clinics	17-S
Average Profit, Turnover,		Profile by	
Sales Per Employee	31-S	State	48-S, 49-S
Balance Sheet	31-S	Profile of Median	
Costs as Percentage		Wholesaler	9-S
of Sales	30-S	Profit Ratios	10-S
MEMA Profile of		Sales by	
Average WD	28-S	Geographic Area	24-S
Performance Measures	27-S	Sale per	
Automotive Wholesalers		Square Foot	26-S
Affiliations	24-S	Services to the	
Asset Management	15-S	Retail Trade	38-S
Balance Sheet	10-S	Services to the	
Costs, Income, Profit		Wholesale Trade	38-S
as Percent of Sales	8-S	Strongest Retail	
Cost per Clinic	17-S	Competitors	47-S
Employees, Number		Shop Profit as Percent	
by Category	18-S	of Labor Sales	16-S
Employees, Productivity		Unit Sales of Selected	
Measures	15-S	Product Lines	21-S
Expense Item Statement	14-S	Vehicle Registrations	
		Per Outlet	7-S
		Where Selected Items	
		Are Sold	18-S

Batteries, Factory Shipments	14-S	PBE Leading Profit Makers	18-S
Buses		Remanufacturers (See Automotive Production Rebuilders)	
Average Miles Per Year	25-S		
Registration by State	29-S		
Canadian Automotive Industry		Service Stations	
Trade in Products With U.S.	26-S	Dealers by State	7-S
		Parts & Service Sales	5-S
Car Dealers		TBA Dealers	
Number by State	7-S	Number of	5-S
Number by Year	20-S	Parts & Service Sales	5-S
Parts & Service Sales	45-S		
Cars		Trade Associations	
Annual Factory Sales	37-S	State & Regional, Size	16-S
Average Cost to Own And Operate	44-S	Trade Shows	
Average Miles Per Year	25-S	International Show	
Imported Car Sales	39-S	Statistics	42-S
Model Run Output by Size	22-S, 23-S	Regional Show Statistics	43-S
Production by Make	40-S, 41-S		
Production by Model Year	33-S	Truck Dealers	
Production Milestones	43-S	Number by State	7-S
Registration by State	6-S	Trucks	
Establishments Handling Automotive Products	19-S	Average Miles Per Year	25-S
		Production Milestones	36-S
Heavy Duty Distributors (See Automotive Heavy Duty Distributors)		Registration by State	6-S
		Registration by State, Trucks	46-S
Jobbers (See Automotive Wholesalers)		Van and Light Truck Production	50-S
Machine Shops—Profit as a Percent Of Labor Sales	16-S	Vehicle Production Milestones	44-S
Manufacturers (See Automotive Manufacturers)		Warehouse Distributor (See Automotive Warehouse Dist.)	
		Wholesalers (See Automotive Wholesalers)	

Automotive Wholesalers Among Largest in 1984

Based on Number of Branch Stores and Outside Salesmen

	Branches	Salesmen	Shops
Acme Auto Supply, Inc., West Hartford, CN	28	11	1
Arnold Motor Supply, Spencer, IA	19	46	19
Automotive, Inc., The, of Mid-America Ind., Inc., Ft. Smith, AR	65	15	12
Automotive Supply Co., Altoona, PA	24	28	5
Automotive Supply Co., Appleton, WI	11	15	6
Barnes Motor & Parts Co., Inc., Wilson, NC	25	34	6
Big A Auto Parts Stores, Div. of APS, Inc., Houston, TX	158	101	33
Brooks Auto Parts, Inc., Douglas, GA	60	23	10
Burdman Auto Parts, Inc., J., Kirksville, MO	29	28	1
Chanen's Auto Supply Co., Quincy, IL	14	10	1
Crow-Burlingame Co., Little Rock, AR	55	59	4
Dayton Warehouse Co., Valley City, ND	11	21	8
Dryden Oil Co., Inc., Baltimore, MD	10	65	—
Everson Co., H. E., Grand Forks, ND	21	15	1
Fochtman Motor Co., Petoskey, MI	12	13	3
General Automotive Supply Co., Worcester, MA	24	10	1
Global Parts, Inc., Troy, MI	12	33	9
Heavy Duty Parts, Inc., Harrisburg, PA	23	55	3
Heavy Duty Parts, Inc., Parts Ind., Memphis, TN	36	74	10
Hedahls, Inc., Bismark, ND	12	17	10
Inter-State Auto Supply Co., Elizabethtown, KY	15	20	7
Jasper Engine & Transmission Exch., Jasper, IN	13	28	—
Keenan Auto Parts Co., Albany, GA	31	21	18
Linkon's Auto Supply Co., Centralia, IL	29	23	4
Molin-Taylor, Inc., Buffalo, NY	24	10	3
Motor Bearings and Parts Co., Raleigh, NC	18	25	5
Motor Rim & Wheel Service, Montebello, CA	11	42	1
National Auto Supply Co., Hazelwood, MO	27	32	16
Northern Auto Supply Co., Div. of Northern Industries, Marshfield, WI	28	20	11
Republic Automotive, O.K. Auto Parts, Inc., Ironwood, MI	10	10	10
Rodefelf Co., Inc., Richmond, IN	15	15	11
RPS Products, Inc., Baltimore, MD	20	17	—
Rupp Automotive, Chillicothe, MO	18	10	6
Sanel Auto Parts, Inc., Concord, NH	26	25	3
Sieg Nebraska Co., Omaha, NE	10	11	—
Steege Auto Parts, West Palm Beach, FL	56	19	8
Sturdevant's Inc., Wahpeton, ND	13	10	5
Valley Motor Supply, Billings, MT	36	31	11
Wharton & Barnard, Inc., Milford, DE	10	14	3
Western Auto Parts Co., Fargo, ND	11	20	8
Womwell Automotive Parts Co., Inc., Lexington, KY	16	14	3
Woolwine Supply Co., The, Pratt, KS	11	12	3

Source: JOBBER TOPICS, Directory of Automotive Jobbers, 1984-85.

Scope of the Automotive Service Industry—In Brief

Category	Number
Motor vehicle manufacturers (1977)	322 ¹
Motor vehicle parts and accessories manufacturers (1977)	2,623 ¹
Automotive production remanufacturers	1,508 ²
Manufacturers merchandise agents and brokers selling automotive parts and supplies (i.e., manufacturers' agents) (1977)	940 ³
Manufacturers' sales branches and sales offices selling automotive parts and supplies (1977)	701 ³
Wholesalers of automotive parts and supplies (1982)	29,839 ⁴
Gasoline service stations qualified for repair and service work (1984)	86,964 ⁵
Automobile repair shops (1982)	88,445 ⁶
New car dealers (1982)	25,641 ⁶
Used car dealers (1982)	11,551 ⁶
Fleets (of 10 or more vehicles—1982)	47,050 ⁷
Merchant wholesalers of farm and garden machinery and equipment (1982)	13,204 ⁸
TBA dealers (1983)	20,000 ⁹
Mass merchandisers (1983)	2,800 ⁹
National trade associations and industry groups (1983)	88 ⁹
State and regional (multi-state) trade associations (1984)	34 ⁹

National Sales Figures

Sales of merchant wholesalers of automotive parts and supplies (1982)	\$45.6 billion ⁷
Automotive parts and service sales at retail (1983)	\$83.2 billion ⁶

Sources: ¹U.S. Census of Manufacturers (1977). ²Estimates by the Automotive Parts Rebuilders Assn. (1985). ³U.S. Census of Business (1977). ⁴U.S. Census of Business (1982). ⁵SUPER SERVICE STATION magazine (1984). ⁶U.S. Census of Service Industries (1982). Figure is for number of establishments with payroll. ⁷Fleet Equipment magazine (1982). ⁸National Automobile Dealers Assn. ⁹JOBBER TOPICS magazine (1984).

Total Parts and Service Market: 1979-1984

(Billions of Dollars)

	1979	1980	1981	1982	1983	1984
Franchised New Car Dealerships	\$23.1	\$22.7	\$23.1	\$24.5	\$26.8	\$30.7
Auto Repair Shops ¹	17.7	18.8	19.9	21.0	23.1	25.6
Tire, Battery, and Accessory Dealers	13.3	14.7	16.1	17.0	18.7	20.5
Gasoline Service Stations	5.8	6.3	6.6	6.8	7.5	7.9
Mass Merchandisers	6.0	6.2	6.8	7.0	7.6	7.9
All Others ²	1.8	1.8	1.9	2.0	2.0	2.1
Total	67.7	70.5	74.4	78.3	85.7	94.7

Source: National Automobile Dealers Assn., Industry Analysis Div. and U.S. Bureau of Census. ¹Includes independent and franchised repair shops. ²Includes non-franchised dealers, farm equipment dealers, and fleet shops. NOTE: Revenue for each type of repair facility includes tire sales.

State-by-State Look

State	Car Registration ¹	Truck & Bus Registration ¹	Total Registration ¹	Wholesaling Outlets ²
Ala.	2,194,794	844,666	3,039,460	566
Alaska	199,956	188,594	318,550	49
Ariz.	1,582,896	632,653	2,215,549	384
Ark.	965,330	516,036	1,481,366	397
Calif.	13,420,945	3,709,458	17,130,403	2,760
Colo.	1,843,399	658,328	2,501,727	386
Conn.	2,099,377	158,598	2,257,975	398
Del.	333,803	80,961	414,764	70
D. of C.	212,762	18,606	231,368	29
Fla.	6,753,616	1,580,978	8,334,594	1,563
Ga.	2,995,234	920,585	3,915,819	923
Hawaii	528,125	58,181	586,306	78
Idaho	529,194	343,442	872,636	159
Ill.	5,855,187	1,386,795	7,241,982	1,274
Ind.	2,874,145	1,009,472	3,883,617	773
Iowa	1,667,984	677,821	2,345,805	502
Kan.	1,392,762	668,412	2,061,174	415
Ky.	1,809,711	805,630	2,615,341	496
La.	2,010,151	790,276	2,800,427	526
Maine	541,222	201,635	742,857	160
Md.	2,421,184	472,241	2,893,425	435
Mass.	3,296,631	452,937	3,749,568	730
Mich.	5,005,544	1,244,745	6,250,289	1,229
Minn.	2,338,304	940,121	3,278,425	597
Miss.	1,214,950	378,071	1,593,021	336
Mo.	2,540,190	871,315	3,411,505	745
Mont.	451,097	306,827	757,924	141
Neb.	804,626	410,365	1,214,991	290
Nev.	513,450	196,516	709,966	99
N.H.	660,588	112,976	773,564	124
N.J.	4,389,581	527,798	4,917,379	940
N.M.	779,944	413,217	1,193,161	156
N.Y.	7,201,767	1,033,090	8,234,857	1,940
N.C.	3,445,754	1,137,551	4,583,305	865
N.D.	380,683	272,343	653,026	138
Ohio	6,324,670	1,311,190	7,635,860	1,357
Okla.	1,787,616	992,184	2,779,800	393
Ore.	1,467,482	607,214	2,074,696	338
Pa.	5,617,934	1,106,805	6,724,739	1,434
R.I.	507,284	78,776	586,060	115
S.C.	1,518,689	456,053	1,974,742	375
S.D.	376,735	238,651	615,386	105
Tenn.	2,765,974	615,242	3,381,216	734
Texas	7,992,738	3,395,095	11,387,833	1,932
Utah	712,027	326,384	1,038,411	208
Vt.	269,966	80,915	350,881	77
Va.	3,153,409	551,938	3,705,347	683
Wash.	2,296,429	940,425	3,236,854	502
W. Va.	792,707	349,229	1,141,936	279
Wis.	2,560,470	601,867	3,162,337	554
Wyo.	298,847	208,754	507,601	80
TOTAL	123,697,863	35,811,962	159,509,825	29,839

Sources: ¹U.S. Federal Highway Administration (figures for 1982). ²U.S. Census of Wholesale Trade (1982). ³Vehicles per wholesaling outlet obtained by dividing outlets into total registration. Final figure is average for all states. ⁴R. L. Polk & Co., Marketing Ser-

at the Wholesaler's Market

Vehicles Per Wholesaling Outlet ³	Car Dealers ⁴	Truck Dealers ⁴	Service Stations ⁵	Auto Repair Shops ⁶	State
5,370	335	245	1,221	1,691	Ala.
6,501	23	15	156	164	Alaska
5,770	169	102	738	1,507	Ariz.
3,731	289	237	105	1,083	Ark.
6,207	1,812	949	5,484	14,991	Calif.
6,481	326	225	1,304	1,944	Colo.
5,850	347	175	1,514	1,577	Conn.
5,925	56	36	252	299	Del.
7,978	29	12	171	403	D. of C.
5,332	782	425	3,548	5,757	Fla.
4,242	507	361	2,235	2,825	Ga.
7,517	27	16	313	567	Hawaii
5,488	152	117	572	484	Idaho
5,684	1,544	1,005	4,052	5,030	Ill.
5,024	635	467	2,284	2,577	Ind.
4,672	733	600	2,206	1,526	Iowa
4,967	418	330	1,486	1,312	Kan.
5,273	353	277	1,709	1,355	Ky.
5,324	424	309	1,293	2,035	La.
4,652	187	127	598	537	Maine
6,652	308	183	1,632	1,798	Md.
5,136	560	303	2,467	3,104	Mass.
5,086	1,155	794	2,806	3,887	Mich.
5,491	565	449	2,325	1,706	Minn.
4,741	260	204	718	984	Miss.
4,579	647	502	2,448	2,659	Mo.
5,375	174	135	621	483	Mont.
4,190	365	306	1,293	944	Neb.
7,171	57	40	293	492	Nev.
6,238	132	87	450	498	N.H.
5,231	626	307	3,637	4,052	N.J.
7,648	128	96	684	721	N.M.
4,245	1,330	772	6,354	8,214	N.Y.
5,299	858	563	2,298	2,746	N.C.
4,732	259	227	599	292	N.D.
5,627	1,127	710	3,387	5,039	Ohio
7,073	414	328	1,530	1,483	Okla.
6,138	292	185	984	1,375	Ore.
4,689	1,413	857	5,028	5,996	Pa.
5,096	80	41	450	544	R.I.
5,266	400	273	1,193	1,357	S.C.
5,861	173	153	654	357	S.D.
4,607	521	359	1,587	2,099	Tenn.
5,894	1,517	1,108	4,257	8,481	Texas
4,992	138	107	644	744	Utah
4,557	83	59	320	261	Vt.
5,425	510	349	2,040	2,496	Va.
6,448	364	239	1,401	2,148	Wash.
4,093	231	168	898	630	W. Va.
5,708	727	530	2,368	1,925	Wis.
6,345	91	82	401	302	Wyo.
5,346 ³	24,653	16,546	86,964	115,481	TOTAL

vices Division (1983). ⁵SUPER SERVICE STATION (April 1984). Figures represent stations qualified for automotive repair and service work. ⁶U.S. Census of Business (1982).

ASIA Wholesaler's Costs, Income And Profit as Percentage of Sales

	Median Wholesaler (1983)
SALES	100.00%
Cost of Goods Sold	65.18%
GROSS MARGIN OF PROFIT	34.82%
(Sales minus cost of goods sold)	
SELLING EXPENSE	9.36%
(Includes: Advertising & sales promotion; salesmen's salaries, commission, travel, etc.; sales supervisory salaries & commissions; countermen's salaries & commissions.)	
DELIVERY EXPENSE	2.46%
(Includes: Delivery salaries (including bonuses); vehicle operating expenses; depreciation—vehicle equipment; transportation out and parcel post.)	
STORE AND OCCUPANCY EXPENSE	4.58%
(Includes: Stockroom wages; heat, light & water; rent (or depreciation.))	
GENERAL AND ADMINISTRATIVE EXPENSE	13.85%
(Includes: Executive salaries & bonuses; supervisory salaries & bonuses; clerical salaries, wages & bonuses; purchase & inventory control salaries & wages; travel & trade relations; office supplies & postage; misc. G & A expense (dues & donations); EDP equipment or purchase service cost; telephone & telegraph; legal & professional fees; general taxes; general insurance; employee benefits.)	
TOTAL OPERATING EXPENSES	32.94%
NET OPERATING INCOME	2.24%
TOTAL OTHER INCOME	1.54%
TOTAL INCOME	3.76%
TOTAL OTHER EXPENSES	1.40%
NET PROFIT BEFORE MACHINE SHOP	2.32%
NET PROFIT FROM SHOP OPERATIONS	.64%
NET PROFIT BEFORE TAXES	2.67%
FEDERAL INCOME TAXES	.60%
NET PROFIT AFTER TAXES	1.91%

Source: 1984 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Quick Profile of the Median ASIA Wholesaler

Figures Apply to 1983

SALES PERFORMANCE

Average Sales Volume	\$1,426,170
Percent Increase Over Previous Year	1.34%
Cash Sales as Percent of Total Sales	26.85%

PROFITABILITY PERFORMANCE

Gross Profit Margin as Percent of Net Sales	34.82%
Net Profit Before Taxes as Percent of Net Sales	2.67%
Net Profit After Taxes as Percent of Net Sales	1.91%

ASSET MANAGEMENT

Average Inventory Turnover Rate	2.88 (times)
Number of Days Average Inventory Carried	127 Days
Days Credit Sales in Accounts Receivable	44 Days

FINANCIAL MANAGEMENT¹

Net Worth to Total Indebtedness	1.59 to 1
Current Ratio	3.53 to 1
Accounts Receivable to Accounts Payable	1.24 to 1

OPERATING EXPENSES

Total Operating Expenses to Net Sales	32.94%
Total Payroll Expense as Percent of Net Sales	17.93%

PERSONNEL MEASUREMENTS

Sales Volume Per All Non-Shop Employees	\$89,420
Average Payroll Per All Non-Shop Employees	\$15,830

MACHINE SHOP PERFORMANCE

Shop Sales Per Shop Employee	\$24,500
Average Wage or Salary Per Shop Employee	\$15,070
Gross Profit Margin as Percent of Shop Labor Sales	33.99%
Shop Net Profits to Shop Labor Sales	10.68%

Source: 1984 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association. ¹These ratios relate dollars to dollars. In the ratio of accounts receivable to accounts payable, for instance, the median wholesaler had \$1.24 of accounts receivable for every \$1.00 of accounts payable.

The Meaning of Median Figures

Readers will notice that a number of tables in this special section make use of median figures instead of, say, average figures. Many modern business analysts believe that medians are more precise than averages—hence a growing trend toward the use of medians.

The word "median," according to the dictionary, refers to the middle. In a statistical sampling, the word median refers to that firm whose figures place it in the exact middle of the sampling. In a study of the business costs of a thousand automotive wholesalers, for example, the median wholesaler would be that firm in the middle; five hundred of the firms would have higher costs and five hundred would have lower costs—in graduated figures working away from that median or middle firm.

ASIA's Median Wholesaler: How His Profits Scored in 1983

	Median Wholesaler (1983)
Gross Profit Margin as Percent of Net Sales	34.82%
Net Profit (Before Taxes) as Percent of Net Sales	2.67%
Net Profit (After Taxes) as Percent of Net Sales	1.91%
Net Profit (Before Taxes) as Percent of Total Assets	6.53%
Net Profit (After Taxes) as Percent of Total Assets	4.55%
Net Profit (Before Taxes) as Percent of Net Worth	11.91%
Net Profit (After Taxes) as Percent of Net Worth	8.00%
Net Profit (Before Taxes) as Percent of Net Working Capital	11.36%
Net Profit (After Taxes) as Percent of Net Working Capital	8.11%
Shop Gross Profit as Percent of Shop Labor Sales	33.99%
Shop Net Profit as Percent of Shop Labor Sales	10.68%

Source: 1984 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Balance Sheet of Median ASIA Wholesaler—1983

	Median Wholesaler (1983)
ASSETS	
Cash and Marketable Securities	10.38%
Accounts & Notes Receivable, Trade, Net	20.56%
Inventory (End of Period)	50.17%
All Other Current Assets	2.82%
Total Current Assets	84.13%
Net Fixed & All Other Non-Current Assets	15.87%
Total Assets	100.00%
LIABILITIES AND NET WORTH	
Accounts & Notes Payable, Trade	19.85%
Other Notes Payable & Other Current Liabilities	8.97%
Total Current Liabilities	28.67%
Long Term Liabilities	13.38%
Total Liabilities	42.04%
Total Net Worth or Equity	57.96%
Total Liabilities & Net Worth	100.00%

Source: 1984 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Leading Merchandise Items As Reported by ASIA Wholesalers

The following merchandise items proved to be "best sellers" for ASIA wholesalers during 1983. Each item contributed more than one percent to the average wholesaler's total sales volume.

- | | |
|---|---|
| 1. Filters & Cartridges | 14. Gaskets |
| 2. Storage Batteries | 15. Motor Oil |
| 3. Paint | 16. Alternators, Generators & Parts |
| 4. Belts & Hoses | 17. Hand Tools (Manual) |
| 5. Exhaust System Parts | 18. Bearings (All Except Engine) |
| 6. Service Dealer Shop Equipment | 19. Caps, Rotors, Points, Coils, Condensers |
| 7. Spark Plugs | 20. Wiring & Cable |
| 8. Brake Shoes & Linings | 21. Carburetors |
| 9. Electronic Ignition Parts | 22. Water Pumps & Parts |
| 10. Shock Absorbers, Levelizers, Struts | 23. Tie Rods & Ends |
| 11. Brake Cylinders (Master & Wheel) | 24. Starter Motors |
| 12. Abrasives, Adhesives | 25. Engine Bearings |
| 13. Air Conditioners & Parts | 26. Additives |

Source: 1984 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Employee Pay as Percent of Sales —Based on Median ASIA Jobber

Figures Apply to 1983

	Percent Of Sales (1983)
Outside Salesmen's Salaries, Travel, etc.	2.58%
Countermermen's Salaries & Commissions	6.14%
Deliverymen's Salaries (Including Bonuses)	1.04%
Stockroom Wages	.94%
Executive Salaries & Bonuses	3.20%
Clerical Salaries & Bonuses	1.81%
Purchase & Inventory Salaries & Wages	none
Employee Benefits	16.78%
Total Payroll Expense	17.93%
Total Compensation	21.05%

Source: 1984 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

ASIA Jobber's Operating Costs As Percent of Gross Margin

	Median Wholesaler (1983)
Total Selling Expenses as Percent of Net Sales	9.36%
Total Selling Expenses as Percent of Gross Margin	27.47%
Non-People Sales Expenses as Percent of Total Sales Expenses	10.77%
Total Delivery Expenses as Percent of Net Sales	2.46%
Total Delivery Expenses as Percent of Gross Margin	7.31%
Non-People Delivery Expenses as Percent of Total Delivery Expenses	52.07%
Total Store & Occupancy Expenses as Percent of Net Sales	4.58%
Total Store & Occupancy Expenses as Percent of Gross Margin	14.22%
Non-People Store & Occupancy Expenses as Percent of Total Store & Occupancy Expenses	75.10%
Total General & Administrative Expenses as Percent of Net Sales	13.85%
Total General & Administrative Expenses as Percent of Gross Margin	39.31%
Non-People General & Administrative Expenses as Percent of Total General & Administrative Expenses	56.04%

Source: 1984 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Leading Product Groupings As Reported by ASIA Wholesalers

The following product "families" or lines proved to be the "best sellers" for ASIA wholesalers during 1983. Lines are ranked according to the dollar volume of sales generated.

- | | |
|--------------------------------------|----------------------------------|
| 1. Starting, Generating, Electrical | 13. Drive Train Components |
| 2. Paint, Body & Equipment | 14. Fuel System Parts |
| 3. Brake System Parts | 15. Hand Tools |
| 4. Ignition System Parts | 16. Gaskets |
| 5. Chassis, Steering, Suspension | 17. Motor Oil |
| 6. Filters & Cartridges | 18. Bearings (All Except Engine) |
| 7. Belts & Hoses | 19. Lighting System |
| 8. Exhaust System Parts | 20. Seals |
| 9. Accessories & Specialty Items | 21. Grease & Lubricants |
| 10. Engine Parts (Internal) | 22. Tires & Tubes |
| 11. Shop Equipment (Service Dealers) | 23. Small Engines & Parts |
| 12. Chemicals | |

Source: 1984 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

PBE Wholesalers' Cost of Doing Business, as Reported by ASIA

**Median Figures—Based on 1983 Operations
and Expressed as Percentage of Total Sales**

NET SALES (After Returns & Allowances)	100.0%
Cost of Sales—Merchandise	65.7%
Gross Margin of Profit—Merchandise	34.3%
Total Operating Expenses (Selling, Delivery, Store, General & Administrative)	31.8%
Net Operating Income	2.4%
Total Other Income	1.2%
Total Other Expenses	.8%
Net Profit Before Taxes	2.5%
Federal Income Tax	.4%
Net Profit After Taxes	2.1%

OPERATING EXPENSES

Labor & Commissions (All payroll for executives, salesmen, and other employees)	16.4%
Advertising and Sales Promotion	.4%
Vehicle Expense—Total (Includes delivery expenses, salesmen's cars, other company operated vehicles)	1.6%
Freight	.2%
Donations	.1%
Professional Fees (Includes Legal, Accounting, etc.)	.3%
Bad Debts	.4%
Dues and Subscriptions	.1%
Interest	.8%
Depreciation (Vehicle equipment, store fixtures, etc.)	1.5%
Travel and Entertainment (All company related)	.3%
Utilities (Heat, Lights, Water)	.4%
Telephone	.6%
Insurance (Includes group, life, vehicle, etc.)	1.6%
Office and Store Expense (Supplies, light bulbs, etc.)	.5%
Rent	1.4%
Repair and Maintenance (Building)	.3%
Data Processing Equipment (Leasing, purchase, service)	.6%
Taxes (General)	.4%
Taxes (Payroll—for all employees)	1.3%
Employee Benefits (Includes profit sharing, pension fund, IRA, etc.)	.6%
Additional Expenses	.4%

TOTAL OPERATING EXPENSES 31.8%

Median Sales for all reporting PBE Wholesalers—\$1,206,023
Inventory Turnover (Median) — 5.1 Turns
Number of Employees (including executives) — Full Time—9
Part Time—1.5

Source: 1984 Edition of Cost of Doing Business Study for ASIA PBE Wholesaler Division.

Expense Item Statement For Median ASIA Jobber

	Percent of Net Sales (1983)
Advertising and Sales Promotion	.65%
Salesmen's Salaries, Travel, etc.	2.58%
Inside Countermermen's Salaries & Commissions	6.14%
Total Selling Expenses	9.36%
Delivery Salaries (including bonuses)	1.04%
Vehicle Operating Expense	.71%
Total Delivery Expenses	2.46%
Stockroom Wages	.94%
Heat, Lights and Water	.79%
Rent (or depreciation)	1.56%
Repairs & Maintenance (building)	.19%
Depreciation (store fixtures and equipment)	.29%
Total Store & Occupancy Expenses	4.58%
Executive Salaries and Bonuses	3.20%
Supervisory Salaries and Bonuses	1.91%
Clerical Salaries and Wages	1.81%
Purchasing & Inventory Control Salaries and Wages	none
Office Supplies and Postage	.44%
EDP Equipment and/or Purchase Service Cost	.82%
Telephone and Telegraph	.68%
Bad Debts less Recoveries	.22%
Legal and Professional Fees	.24%
Taxes, General	.45%
Taxes, Payroll	1.47%
Insurance, General	.70%
Employee Benefits	1.23%
Total General & Administrative Expenses	13.85%
TOTAL OPERATING EXPENSE	32.94%

Source: 1984 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

U.S. Battery Shipments by Year

Year	Replacement	Original Equipment	Total Number
1981	53,597,906	10,005,102	63,603,008
1982	54,200,000	8,400,000	62,600,000
1983	56,104,752	10,822,900	66,927,652
1984	59,332,509	12,765,218	72,097,727

Source: Battery Council International.

ASIA's Median Wholesaler: How Well He Managed His Assets

	Median Wholesaler (1983)
Change in Inventory During Year	(Up) 3.39%
Average Inventory Turnover Rate	2.88 (Times)
Number of Days Average Inventory Carried	126.8 (Days)
Cash Sales as a Percent of Total Sales	26.85%
Days of Credit Sales in Accounts Receivable	43.6 (Days)
Ratio of Sales to Net Working Capital	4.28 to 1
Ratio of Sales to Assets (Total Asset Turnover)	2.29 to 1 ¹

Source: 1984 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by Automotive Service Industry Association. ¹This ratio relates dollars to dollars. There were \$2.29 of sales, for instance, to every \$1.00 of assets.

Key Business Ratios For ASIA's Median Wholesaler¹

	Median Wholesaler (1983)
Ratio of Net Worth to Total Indebtedness	1.59 to 1
Ratio of Total Assets to Net Worth	2.29 to 1
Ratio of Sales to Net Worth (Turnover of Net Worth)	4.09 to 1
Ratio of Current Assets to Current Debts	3.35 to 1
Ratio of Accounts Receivable to Accounts Payable	1.24 to 1

Source: 1984 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association. ¹All these ratios relate dollars to dollars. In the ratio of sales to net worth, for instance, the median wholesaler had \$4.09 of sales for every \$1.00 of net worth.

Productivity Measures For Staff of ASIA Jobber

Average Number of Non-Shop Employees	15
Merchandise Sales Per Non-Shop Employee	\$89,420
Merchandise Gross Margin Per Non-Shop Employee	\$28,970
Operating Expense Per Non-Shop Employee	\$27,930
Total Payroll Expense as Percent of Merchandise Sales	17.93%
Total Compensation as Percent of Merchandise Sales	21.65%

Source: 1984 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Relative Size of State and Regional Wholesaler Associations

1984 Rank	Association	1984 Regular Members	1983 Rank	1984 Rank	Association	1984 Regular Members	1983 Rank
1	Texas	1,657	1	17	Virginia	300	20
2	California	1,225	2	18	Georgia	275	23
3	Illinois	930	3	19	Tennessee	265	18
4	Florida	796	5	20	South Carolina	260	26
5	Ohio	625	4	21	Oregon	258	22
6	Michigan	600	6	22	Minnesota	239	24
7	New Jersey	587	7	23	Iowa	235	23
8	Pennsylvania	575	9	24	Wisconsin	206	25
9	Washington	550	11	25	New Mexico	160	27
10	✓New England	500	10	26	Arizona	110	28
10	North Carolina	500	12	27	✓Rocky Mountains	101	32
10	Alabama	500	14	28	Mississippi	98	30
11	✓Missouri/Kansas	494	8	28	Arkansas	98	31
12	New York	422	15	29	Nebraska	71	29
13	Kentucky	416	15	30	Idaho	65	33
14	Oklahoma	403	17	31	West Virginia	52	34
15	Indiana	400	16	32	North Dakota	49	35
16	Louisiana	325	21	33	Montana	32	36
17	✓Chesapeake	300	19	34	Nevada	25	37

Source: August 1984 issue of *JOBBER TOPICS*.

ASIA Wholesaler's Shop Profit As Percent of Labor Sales—1983

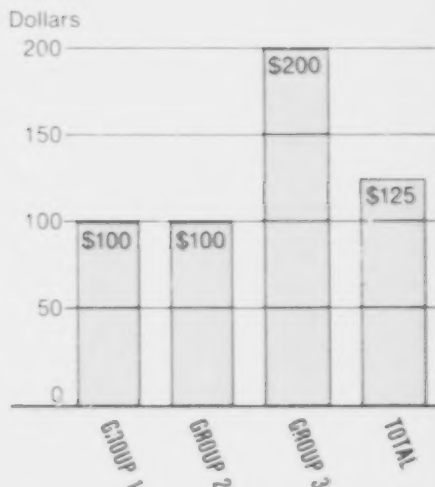
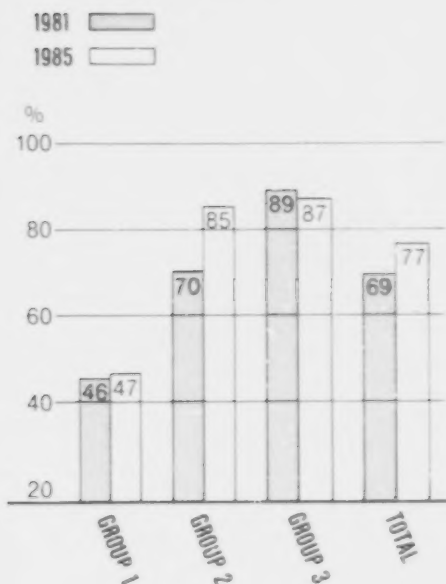
	Median Wholesaler (1983)
SALES—SHOP LABOR	100.00%
Cost of Shop Labor Sales (Salaries, Wages & Bonuses)	66.01%
GROSS PROFIT ON SHOP LABOR SALES	33.99%
All Other Shop Expenses (Overhead, Depreciation, Repairs & Maintenance, Supplies, etc.)	21.90%
NET PROFIT FROM SHOP OPERATIONS	10.68%

Source: 1984 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

1985 Jobber Clinic Study

Percent holding clinics
1985 Compared to 1981

Median cost per clinic



Source: JOBBER TOPICS Forum Report, May 1985. Group 1 (Under \$350,000; Group 2 (\$350,000 to \$750,000); Group 3 (\$750,000 and over).

How Jobbers Manage Inventory

Method of Inventory Management	Percent of Respondents	Sales per Square Foot
Card system	47	\$130
Other manual system	14	\$151
Computer	24	\$154
Card and manual	3	\$135
Other manual & computer	4	\$167
Card and computer	7	\$122
No system	1	\$100

Source: Reprinted with permission from *Jobber Report*, published by the Automotive Parts & Accessories Assn.

Number of Workers, by Category Of Median ASIA Wholesaler

Job Classification	Average Number Employed
Outside Salesmen	2.7
Counter men	5.0
Deliverymen	2.0
Stockroom Employees	2.0
Executives	1.75
General & Administrative Clerical Employees	2.5
Non-Shop Employees	15.0
Shop Employees	4.0

Source: 1984 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Where Jobbers Sell Selected Items

	Brake Parts	Paint Body Supplies	Service Repair Equipment
Gasoline Service Stations	25.6%	1.9%	24.4%
Car Truck Dealers	10.2%	15.9%	11.7%
General Repair Shops (Garages)	23.5%	12.4%	22.1%
Specialized Service Repair Shops	3.4%	39.0%	5.8%
Fleet Accounts	5.1%	8.7%	9.1%
Industrial Accounts	1.4%	—	3.8%
Tire Dealers	4.2%	—	3.9%
Farm Implement Dealers	.5%	1.4%	1.9%
Retail Trade	25.9%	19.3%	16.3%
All Other	.1%	1.3%	.9%
No Response	.1%	.1%	.1%

Source: JOBBER TOPICS Market Probe Reports, 1984-85.

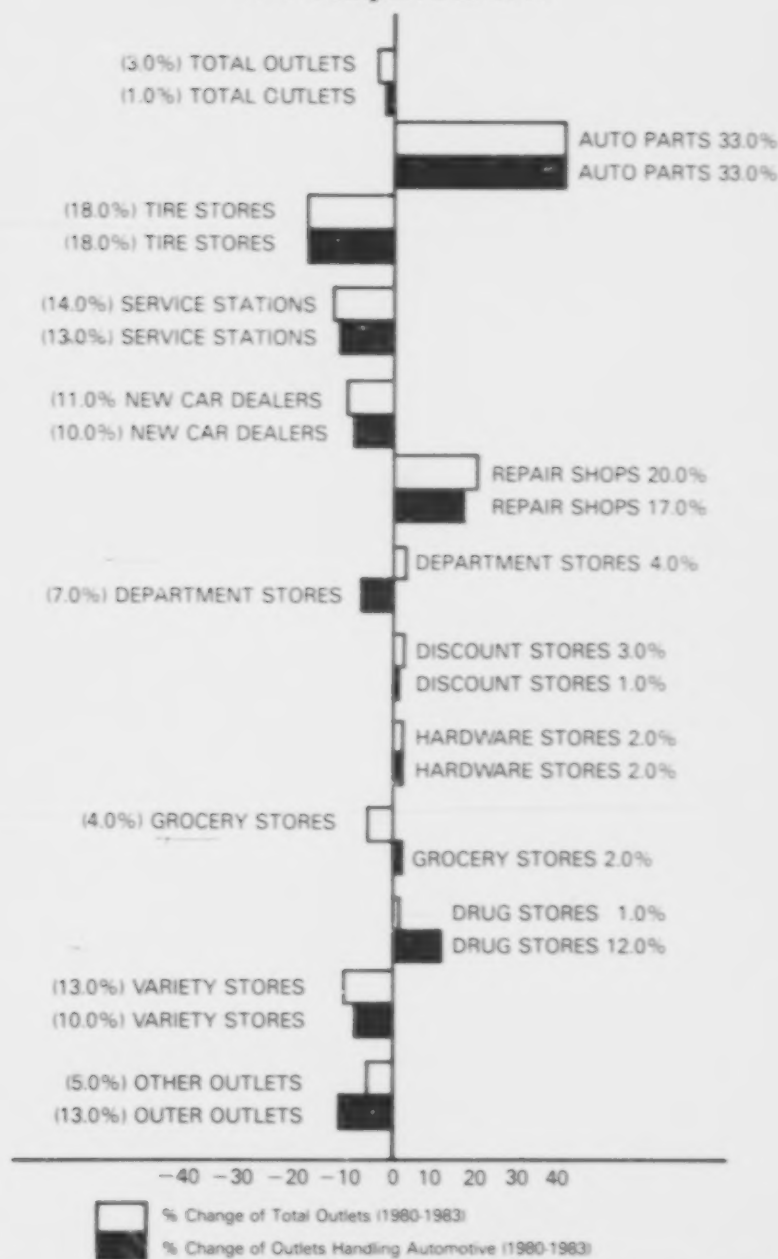
Leading Profitmakers Among PBE Products

	Percentage of Respondents
1. Paint-lacquer, enamel, primer & additives	43.1
2. Body fillers, adhesives, sealing compounds & tape	15.6
3. Sanding paper, discs & grinding wheels, buffing stones	10.8
4. Paint (touch-up)	6.0
5. Polishing equipment & supplies	3.7
6. Leather & upholstery cleaners	3.4
7. Other	16.0
8. No answer	34.6

Source: JOBBER TOPICS Forum Report, August 1984.

Establishments Handling Automotive Products

1980 Compared to 1983



Source: Reprinted with permission from the Automotive Parts & Accessories Assn.

MEMA's "Composite" Wholesaler

ASSETS	1983	1982	1981
Cash	7.1%	8.1%	8.0%
Accounts Receivable	17.6%	19.2%	22.1%
Inventory	46.7%	44.7%	49.6%
Total Current Assets	71.4%	72.0%	79.7%
Deferred Assets	28.6%	28.0%	20.3%
Total Assets	100.0%	100.0%	100.0%

LIABILITIES & NET WORTH

Current Debt	38.0%	36.7%	31.4%
Long Term Debt	18.4%	16.3%	14.1%
Net Worth	43.6%	47.0%	54.5%
Total Debt & Net Worth	100.0%	100.0%	100.0%

FINANCIAL RATIOS

Collection Period—Days	28.4	31.5	34
Quick Ratio	.65	.74	.96
Current Ratio	1.88	1.96	2.53
Inventory to Working Capital	140.0%	126.7%	102.8%
Inventory to Current Assets	65.5%	62.1%	62.2%
Current Debt to Inventory	81.3%	82.1%	63.4%
Current Debt to Net Worth	87.0%	78.0%	57.6%
Total Debt to Net Worth	128.3%	112.1%	83.5%

PROFIT & LOSS STATEMENT

	1983	1982	1981
Net Sales	100.0%	100.0%	100.0%
Cost of Goods Sold	68.3%	66.6%	67.0%
Gross Profit	31.7%	33.4%	33.0%
*Expenses	29.2%	31.0%	30.1%
Net Profit After Taxes	2.5%	2.4%	2.9%

OPERATING RATIOS

Gross Profit to Sales	31.7%	33.4%	33.0%
Net Profit to Sales	2.5%	2.4%	2.9%
Net Profit to Net Worth	12.7%	11.1%	12.9%
Net Profit to Working Capital	16.6%	14.8%	14.6%
Net Profit to Total Assets	5.5%	5.2%	7.0%

EFFICIENCY RATIOS—TIMES

Net Sales to Net Worth	5.2	4.7	4.5
Net Sales to Working Capital	6.8	6.3	5.0
Inventory Turnover	3.3	3.3	3.3
Net Sales to Total Assets	2.3	2.2	2.4

Source: 1984 Edition of the *Automotive Distributor Trends & Financial Analysis*, published by the Motor & Equipment Manufacturers Association. *Includes net of other income, deduction and taxes.

Unit Sales by Median Jobbers Of Selected Product Lines

Line	Unit Sales Per Month of Median Jobber	
	Type A Jobber*	Type B Jobber**
Alternators (New and remanufactured)	24	25
Batteries	28	20
Brake Lining Sets	122	94
Cables:		
Battery	54	52
Spark Plug	50	44
Carburetors (New and Remanufactured)	12	15
Clamps	300	200
Exhaust System Parts:		
Mufflers	50	25
Pipes	82	44
Filters:		
Air	140	100
Fuel	120	85
Oil	250	150
Fuel Pumps	36	32
Gasket Sets:		
Complete Overhaul	11	8
Valve Grind	22	15
Grease (Measured in Pounds)	100	50
Hoses	100	55
Ignition Parts:		
Breaker Points/Condensers	200	125
Coils	20	15
Distributor Caps/Rotors	52	50
Ignition Switches	16	15
Oil (Measured in Cases)	35	25
Piston Ring Sets	14	5
Sealed Beams	84	40
Shock Absorbers	55	25
Spark Plugs	1,392	900
Starter Drives	18	25
Suspension Parts:		
Ball Joints	20	10
Idler Arms	12	10
Tie Rod Ends	20	15
V-Belts	150	100
Water Pumps	30	25
Water Bearings/Oil Seals	65	55

*Group A Jobbers have retail sales of item listed that account for 50 percent or less of that item's total sales. **Group B Jobbers have retail sales of item listed that are greater than 50 percent of that item's total sales.

Source: "MARKET PROBE" reports—Irving-Cloud Publishing Co.

Model Run Output in

SUBCOMPACTS

1984 Position	1984 Total	Make	1983 Total	1983 Position
1	331,802	Escort	244,780	1
2	243,904	Chevette	169,563	2
3	147,902	Horizon	94,829	5
4	142,494	Omni	101,514	4
5	134,585	Fiero	—	
6	121,015	Alliance	142,205	3
7	117,200	Accord	33,508	8
8	104,301	Rabbit	73,446	6
9	87,609	Encore	—	
10	69,720	Laser	—	
11	66,056	Lynx	69,497	7
12	55,083	Pontiac 1000	25,977	9
13	53,635	Daytona	—	
14	23,016	EXP	2,246	12
15	5,866	Acadian	11,640	10
	—	Spirit	3,491	11
	—	LN7	699	13
	1,704,188	Total	973,395	

COMPACTS

1	462,612	Cavalier	218,588	1
2	261,592	Camaro	154,381	3
3	214,033	Tempo	—	
4	187,245	Reliant	174,170	2
5	169,290	Pontiac 2000	78,329	8
6	150,702	Aries	136,440	4
7	145,393	Skyhawk	63,152	10
8	141,480	Mustang	120,873	5
9	128,304	Firebird	74,884	9
10	111,808	LeBaron	78,970	7
11	82,475	Firenza	40,752	11
12	59,359	Topaz	—	
13	21,898	Cimarron	19,294	15
14	20,642	Capri	25,376	13
	—	Eagle	17,730	16
	—	Fairmont	80,833	16
	—	Dodge 400	28,413	12
	—	Zephyr	25,203	14
	2,156,833	Total	1,337,388	

INTERMEDIATES

1	309,288	Celebrity	105,923	8
2	309,124	Cutlass Supreme	271,892	1
3	280,839	Cutlass Ciera	169,650	3
4	224,754	Regal	228,239	2
5	219,858	Century	127,926	5

U.S.: 1984 Compared to 1983

1984 Position	1984 Total	Make	1983 Total	1983 Position
6	213,742	LTD	155,758	4
7	170,551	Thunderbird	121,999	6
8	136,778	Monte Carlo	96,319	10
9	131,171	Cougar	75,743	12
10	111,211	Skylark	104,647	9
11	107,812	Marquis	67,358	13
12	102,205	Citation	92,211	11
13	72,070	Dodge 600	38,097	18
14	69,746	New Yorker E	37,607	19
15	52,986	Omega	53,926	15
16	36,494	Chrysler E	43,305	16
17	29,269	Bonneville	54,414	14
18	24,244	El Camino	117,426	7
19	23,953	Grand Prix	40,165	17
20	22,847	Phoenix	27,493	20
21	7,932	Caravelle	4,490	23
	—	Concord	5,300	22
	—	Pontiac 6000	5,576	21
	2,656,874	Total	2,045,464	

STANDARDS

1	293,868	Oldsmobile	220,994	1
2	276,492	Chevrolet	220,789	2
3	172,275	Buick	145,633	3
4	90,341	Grand Marquis	95,718	4
5	86,084	Crown Victoria	56,736	5
6	25,624	Parisienne	—	
7	23,626	Diplomat	—	
8	14,685	Gran Fury	—	
	982,995	Total	739,870	

LUXURY

1	160,599	Cadillac	175,674	1
2	93,622	Lincoln	53,381	5
3	88,085	Fifth Avenue	—	
4	77,806	Eldorado	67,416	4
5	76,833	Olds 98	119,764	2
6	57,863	Riviera	50,234	6
7	56,626	Electra	88,585	3
8	51,547	Corvette	—	
9	48,100	Toronado	39,605	7
10	39,997	Seville	30,430	9
11	33,244	Mark VII	30,856	8
12	30,468	Continental	16,831	10
	814,890	Total	672,776	

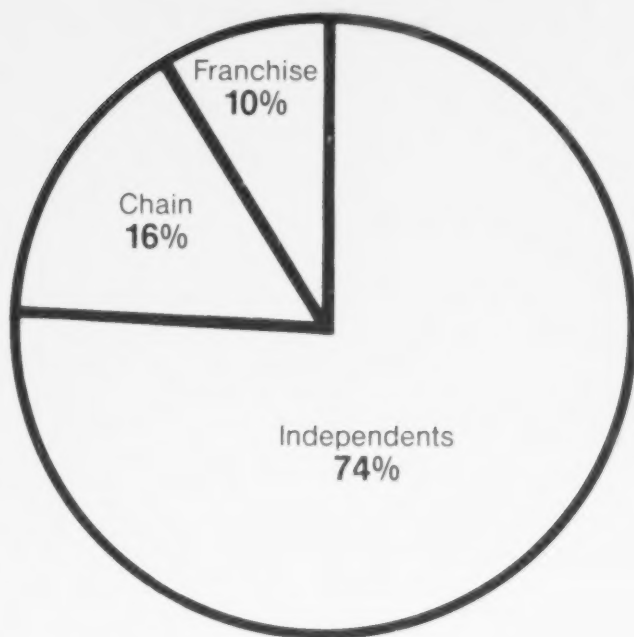
8,315,780

GRAND TOTAL

5,768,893

Source: Reprinted by permission from *Automotive News*. Copyright 1985.

Jobber Affiliations



Source: Reprinted with permission from *Jobber Report*, published by the Automotive Parts and Accessories Assn.

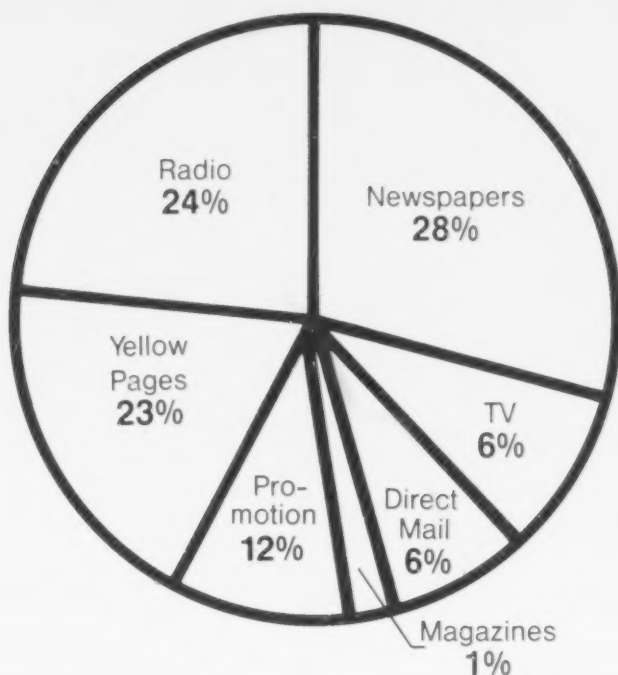
Jobber Sales per Square Foot by Geographic Area

First Digit Zip Code	State	Percent Respondents	Average Sales per Square Foot
0	CT, ME, MA, NH, NJ, RI, VT	9	\$151
1	DE, NY, PA	11	\$189
2	DC, MD, NC, SC, VA, WV	8	\$112
3	AL, FL, GA, MS, TN	17	\$118
4	IN, KY, MI, OH	11	\$133
5	IA, MN, MT, ND, SD, WI	7	\$120
6	IL, KS, MO, NE	9	\$138
7	AR, LA, OK, TX	10	\$ 95
8	AZ, CO, ID, NV, NM, UT, WY	7	\$171
9	AK, CA, HI, OR, WA	11	\$128

Source: Reprinted with permission from *Jobber Report*, published by the Automotive Parts & Accessories Assn.

How Jobbers Advertise

Average Percent of Advertising Dollar



Source: Reprinted with permission from *Jobber Report*, published by the Automotive Parts & Accessories Assn.

Average Miles Per Vehicle by Year

	CARS		BUSES			TRUCKS			
	Passen- ger Cars	Motor- cycles	Com- mer- cial Buses	School Buses	All Buses	Single Unit Trucks	Truck Combi- nations	All Trucks	All Motor Vehicles
1983	9,641	2,149	32,795	6,532	11,521	9,705	52,424	11,178	9,732
1982	9,167	2,612	31,524	6,870	11,872	11,064	49,847	12,395	9,637
1981	9,002	2,573	32,996	6,780	11,953	11,028	47,023	12,340	9,484
1980	9,135	3,144	32,765	7,592	12,103	10,070	42,705	11,433	9,410
1979	9,485	4,000	29,691	7,179	11,732	9,184	49,664	10,810	9,580
1978	10,046	4,500	30,377	7,500	12,143	9,249	49,267	10,974	10,059

Source: U.S. Federal Highway Administration, *Highway Statistics*, Annual.

U.S.-Canadian Trade in Automotive Products, 1983-84

U.S. IMPORTS FROM CANADA	1983	1984	Value Change	Percent Change
	(Canadian \$000,000)			
Cars	\$ 8,973	\$13,085	\$ 4,112	45.8%
Trucks, etc.	4,437	5,880	1,443	32.5%
Parts	7,056	10,287	3,231	45.8%
Tires & Tubes	419	598	179	42.7%
TOTAL	\$20,885	\$29,850	\$8,965	42.9%

CANADIAN IMPORTS FROM THE U.S.				
Cars	\$ 4,886	\$ 6,085	\$1,199	24.5%
Trucks, etc.	1,129	2,039	910	80.6%
Parts	11,358	15,446	4,088	36.0%
Tires & Tubes	225	345	120	53.3%
TOTAL	\$17,598	\$23,915	\$6,317	35.9%

BALANCE			
Cars	+\$4,087	+\$7,000	+\$2,913
Trucks, etc.	+ 3,308	+ 3,841	+ 533
Parts	- 4,302	- 5,159	- 857
Tires & Tubes	+ 194	+ 253	+ 59
TOTAL	+ 3,287	+ 5,935	+ 2,648

Source: Automotive Industries Assn. of Canada.

Jobber Sales per Square Foot Compared to Total Sales Volume

Sales Volume	Percent of Respondents	Sales per Square Foot
Under \$50,000	2	\$ 37
50,000-99,999	5	\$ 41
100,000-199,999	17	\$ 78
200,000-299,999	17	\$ 88
300,000-399,999	20	\$153
400,000-499,999	10	\$188
500,000-599,999	6	\$211
600,000-749,999	6	\$221
750,000-999,999	6	\$232
1,000,000-and above	11	\$167

Source: Reprinted with permission from *Jobber Report*, published by the Automotive Parts & Accessories Assn.

Performance Measures For ASIA Warehouse Distributors

	Median Distributor (1984)
SALES PERFORMANCE	
Dollars of Net Sales	\$5,315,400
Percent of Sales Change Over Prior Year	9.26%
Number of Manufacturers Represented	64.00
Number of Product Lines Represented	100.00
PROFITABILITY PERFORMANCE	
Gross Margin to Net Sales	24.47%
Net Operating Profit to Net Sales	3.58%
Net Profit Before Taxes to Total Assets	6.84%
Net Profit Before Taxes to Net Worth	14.84%
Net Profit Before Taxes to Net Working Capital	13.67%
ASSET MANAGEMENT	
Average Inventory Turnover Rate	3.75 times
Days Sales in Accounts Receivable	46.09 days
Sales to Net Working Capital	4.93 to 1
Total Asset Turnover	2.42 to 1
FINANCIAL MANAGEMENT	
Net Worth to Total Indebtedness	99.74%
Total Assets to Net Worth	2.00 to 1
Turnover of Net Worth	4.90 times
Current Assets to Current Liabilities	2.35 to 1
Cash Plus Marketable Securities Plus Trade Receivables to Current Debt	.89 to 1
Accounts Receivable to Accounts Payable	1.15 times
OPERATING EXPENSE CONTROL	
Total Operating Expense to Net Sales	20.37%
Total Operating Expense to Gross Margin	84.91%
Selling Expense to Net Sales	3.61%
Delivery Expense to Net Sales	2.09%
Warehouse & Occupancy Expense to Net Sales	5.30%
General & Administrative Expense to Net Sales	8.68%
PERSONNEL PRODUCTIVITY	
Net Sales Volume Per Employee	\$ 181,020
Gross Margin Per Employee	44,220
Net Sales Volume Per Outside Salesman	1,980,740
Total Payroll Expense as a Percent of Net Sales	10.19%
Total Payroll Expense as a Percent of Gross Margin	43.03%

Source: 1985 Edition of the Cost of Doing Business Analysis for ASIA Automotive Warehouse Distributors. Some figures in the above table relate dollars to dollars. The figures for "Sales to Net Working Capital," for instance, can be interpreted to mean there were \$4.93 sales for every dollar of working capital.

MEMA's Profile of Average WD

ASSETS	1983	1982	1981
Cash	7.1%	7.1%	2.5%
Accounts Receivable	28.9%	30.1%	32.7%
Inventory	43.0%	45.3%	48.6%
Total Current Assets	79.0%	82.5%	83.8%
Deferred Assets	21.0%	17.5%	16.2%
Total Assets	100.0%	100.0%	100.0%

LIABILITIES & NET WORTH

Current Debt	47.5%	51.3%	48.9%
Long Term Debt	11.6%	8.8%	8.7%
Net Worth	40.9%	39.9%	42.4%
Total Debt & Net Worth	100.0%	100.0%	100.0%

FINANCIAL RATIOS

Collection Period—Days	41.9	42.4	45
Quick Ratio	.76	.72	.72
Current Ratio	1.66	1.61	1.71
Inventory to Working Capital	136.4%	145.4%	139.1%
Inventory to Current Assets	54.4%	54.9%	57.9%
Current Debt to Inventory	110.4%	113.5%	100.6%
Current Debt to Net Worth	116.0%	128.8%	125.3%
Total Debt to Net Worth	144.0%	150.3%	136.8%

PROFIT & LOSS STATEMENT

	1983	1982	1981
Net Sales	100.0%	100.0%	100.0%
Cost of Goods Sold	78.1%	77.8%	76.9%
Gross Profit	21.9%	22.2%	23.1%
*Expenses	20.1%	20.4%	21.3%
Net Profit After Taxes	1.8%	1.8%	1.8%

OPERATING RATIOS

Gross Profit to Sales	21.9%	22.2%	23.1%
Net Profit to Sales	1.8%	1.8%	1.8%
Net Profit to Net Worth	10.9%	11.4%	11.4%
Net Profit to Working Capital	14.1%	14.7%	13.8%
Net Profit to Total Assets	4.5%	4.6%	4.8%

EFFICIENCY RATIOS—TIMES

Net Sales to Net Worth	6.2	6.5	6.2
Net Sales to Working Capital	8.0	8.3	7.5
Inventory Turnover	4.6	4.5	4.1
Net Sales to Total Assets	2.5	2.6	2.6

Source: 1984 Edition of the *Automotive Distributor Trends & Financial Analysis*, published by the Motor & Equipment Manufacturers Association. *Includes net of other income, deduction and taxes.

1983 Motor Bus Registration

Private and Commercial

	Private and Commercial		Publicly Owned		Total	Total
	Commercial Buses ¹	School and Other ²	Federal	School ³	School Buses	Buses
Alabama	2,138	180	17	6,168	6,348	8,503
Alaska	899	472	52	269	741	1,692
Arizona	1,165	195	330	2,819	3,014	4,509
Arkansas	35	1,202	13	2,470	3,672	3,720
California	12,197	7,281	262	13,703	20,984	33,443
Colorado	765	842	37	4,022	4,564	5,636
Connecticut	2,092	6,254	18	630	6,884	8,994
Delaware	321	1,129	—	152	1,281	1,602
Florida	3,550	1,137	106	25,483	29,620	33,276
Georgia	1,069	2,200	67	10,841	13,041	14,177
Hawaii	2,329	635	17	628	1,263	3,609
Idaho	692	388	135	1,739	2,127	2,954
Illinois	5,642	12,835	52	3,476	16,311	22,005
Indiana	4,255	4,774	29	8,986	13,760	18,044
Iowa	1,000	263	7	5,800	6,063	7,070
Kansas	397	1,128	6	2,426	3,554	3,957
Kentucky	1,004	685	59	7,144	7,829	8,892
Louisiana	847	14,289	23	4,305	18,594	19,464
Maine	161	418	21	1,864	2,282	2,464
Maryland	3,003	3,493	89	3,851	7,344	10,436
Massachusetts	3,582	6,928	17	338	7,266	10,865
Michigan	2,578	5,648	29	12,880	18,528	21,135
Minnesota	2,220	4,244	34	10,416	14,680	16,914
Mississippi	874	2,101	62	4,626	6,727	7,663
Missouri	892	3,016	72	5,693	8,709	9,673
Montana	439	712	66	484	1,196	1,701
Nebraska	475	658	7	2,950	3,608	4,090
Nevada	1,309	146	89	109	255	1,653
New Hampshire	323	918	1	245	1,163	1,487
New Jersey	6,060	7,151	47	2,236	9,387	15,494
New Mexico	541	2,380	374	480	2,860	3,775
New York	12,786	7,110	89	14,672	21,782	34,657
North Carolina	1,841	7,113	42	21,557	28,670	30,553
North Dakota	116	480	32	1,277	1,757	1,905
Ohio	8,825	3,121	36	19,185	22,306	31,167
Oklahoma	413	1,387	121	9,627	11,014	11,548
Oregon	1,294	2,085	55	7,757	9,842	11,191
Pennsylvania	8,113	13,746	101	5,610	19,356	27,570
Rhode Island	312	1,208	5	—	1,208	1,525
South Carolina	898	2,964	16	8,199	11,163	12,077
South Dakota	288	433	48	1,385	1,818	2,154
Tennessee	1,820	1,288	45	8,075	9,363	11,228
Texas	2,732	11,462	173	39,478	50,940	53,845
Utah	312	75	53	699	774	1,139
Vermont	95	440	11	762	1,202	1,308
Virginia	2,259	243	120	10,543	10,786	13,165
Washington	686	2,001	177	7,208	9,209	10,072
West Virginia	864	59	22	2,479	2,538	3,424
Wisconsin	1,681	7,357	28	3,889	11,246	12,955
Wyoming	803	134	1	1,379	1,513	2,317
District of Columbia	2,246	33	237	272	305	2,788
Total	111,238	156,441	3,550	314,286	470,727	585,515

Source: U.S. Federal Highway Administration. ¹Includes municipally-owned transit buses. ²In some instances church, industrial and other private buses are included here, and in other instances privately-owned school buses could not be segregated from commercial buses, and are included with the latter. ³This column consists primarily of publicly-owned school buses but includes a few privately-owned institutional and industrial buses registered free or at a reduced rate.

Operating Costs of Average WD As Percent of Net Sales: AWDA

Figures Apply to 1984 Operating Experience

	Percent of Net Sales
SALES	
Gross Sales, Merchandise	121.71%
Returned Sales & Allowances, Merchandise	-16.67%
Returned Sales & Allowances, Cores	-5.04%
Total Reductions	-21.71%
NET SALES	100.00%
COST OF GOODS SOLD	
Inventory at Beginning of Period	19.39%
Purchases (net after returns)	78.22%
Merchandise Available for Sales	97.61%
Inventory at End of Period	21.48%
COST OF GOODS SOLD	76.13%
GROSS MARGIN	23.87%
OPERATING EXPENSES	
Selling Expenses	4.32%
(These include: salaries and/or commissions for supervisors, countermen, sales trainers; salesmen travel and trade relations costs; vehicle operation and depreciation, supplies; advertising and sales promotion; WATS or leased line to customers.)	
Delivery and Shipping Expenses	2.22%
(These include: salaries and/or wages for supervisors, drivers; drivers' travel costs; vehicle operation and depreciation; supplies; postage; transportation out.)	
Warehouse and Occupancy Expenses	5.77%
(These include: salaries and/or wages for supervisors, warehouse employees, clerical workers; supplies; heat, light, water; rent; depreciation of buildings, land improvements, leasehold improvements, and warehouse fixtures and equipment; repairs and maintenance for buildings, fixtures and equipment.)	
General and Administrative Expenses	6.42%
TOTAL OPERATING EXPENSES	18.73%
OPERATING INCOME	5.14%
OTHER INCOME	1.91%
(This includes: cash discounts earned; interest received or accrued; gain on sales of assets; service bureau fees; rental income; dividends from subsidiaries; dividend income; other.)	
OTHER EXPENSE	3.24%
(This includes: cash discounts allowed; interest paid or accrued; employees' profit sharing, employees' pension fund expenses.)	
PRETAX INCOME	3.81%

Source: 1985 AWDA Financial Analysis Report of the Automotive Warehouse Distributors Association.

Balance Sheet of Median AWDA Distributor—1984

ASSETS	Pct. of Total Assets
Current Assets	
Cash	1.53%
Receivables, Net	32.67%
Merchandise Inventories	47.15%
Other Current Assets	.87%
Total Current Assets	82.22%
Property, Plant & Equipment Cost	18.91%
Accumulated Depreciation	-8.97%
Net Property, Plant & Equipment	9.94%
Other Assets	7.84%
Total Assets	100.00%
LIABILITIES	
Current Liabilities	
Notes Payable—Bank	9.68%
Notes Payable—Other	3.34%
Accounts Payable	28.62%
Other Current Liabilities	2.96%
Income Taxes Payable	.80%
Total Current Liabilities	45.40%
Long-Term Debt	
Notes Payable	9.67%
Deferred Ledger Balances	.72%
Branch Inter-company Account	2.33%
Total Long-Term Debt	12.72%
Total Liabilities	58.12%
EQUITY	
Net Worth	41.88%
Total Liabilities and Equity	100.00%

Source: 1985 AWDA Financial Analysis Report of the Automotive Warehouse Distributors Assn.

AWDA Figures for WD Net Profit, Turnover, Sales Per Employee

Group	Average Net Sales Volume	Net Profit Before Taxes (Percent)	Days Sales Outstanding Accts. Rec. (Days)	Median Inventory Turns	Sales Per Employee (Dollars)
A	\$ 2,706,163	1.80%	50.02	3.19	\$135,308
B	5,309,847	3.80%	43.56	3.36	180,730
C	7,924,796	3.81%	55.69	3.82	177,686
D	12,037,870	2.71%	49.82	4.15	192,791
E	38,654,889	4.01%	45.67	4.54	189,885
All Companies	12,071,731	3.81%	47.64	3.80	185,266

Source: 1985 AWDA Financial Analysis Report of the Automotive Warehouse Distributors Assn.

Number of Automobile Dealers By Year, 1947 to 1984

Date	No. of Retail Outlets	Pct. Gain or Loss from Previous Year
January 1, 1947	45,580	
January 1, 1948	46,092	+1.12
January 1, 1949	49,173	+6.66
January 1, 1950	46,821	-4.78
January 1, 1951	47,543	+1.54
January 1, 1952	46,014	-3.22
January 1, 1953	45,191	-1.79
January 1, 1954	41,910	-7.26
January 1, 1955	40,374	-3.66
January 1, 1956	41,018	+1.60
January 1, 1957	37,982	-7.40
January 1, 1958	37,188	-2.09
January 1, 1959	35,077	-5.68
January 1, 1960	33,658	-4.05
January 1, 1961	32,482	-3.49
January 1, 1962	31,331	-3.54
January 1, 1963	30,853	-1.53
January 1, 1964	30,827	-0.08
January 1, 1965	30,691	-0.44
January 1, 1966	30,278	-1.35
January 1, 1967	28,422	-6.14
January 1, 1968	27,784	-2.24
January 1, 1969	27,486	-1.07
January 1, 1970	27,071	-1.51
January 1, 1971	26,126	-3.49
January 1, 1972	25,621	-1.93
January 1, 1973	25,441	-0.70
January 1, 1974	25,349	-0.36
January 1, 1975	24,980	-1.46
January 1, 1976	24,453	-2.11
January 1, 1977	24,268	-0.76
January 1, 1978	24,147	-0.50
January 1, 1979	24,051	-0.40
January 1, 1980	23,379	-2.79
January 1, 1981	21,772	-6.87
January 1, 1982 ¹	21,680	-0.41
January 1, 1983 ²	20,799	-4.06
January 1, 1984	20,841	+0.20
January 1, 1985	20,902	+0.29

Source: Reprinted by permission from *Automotive News*. Copyright 1985. ¹Jan. 1, 1982 and subsequent totals include Volkswagen. ²Jan. 1, 1983 and subsequent totals include Renault.

MEMA Members Forecast Overall 1985 Sales Increase

PRODUCT GROUP	Dollar Sales Forecast 1985 vs. 1984	Unit Sales Forecast 1985 vs. 1984
	% Change	% Change
Accessories	+12.0	+ 8.6
Autobody Supplies & Equipment	+10.3	+ 7.6
Chassis Parts	+11.7	+ 6.1
Chemicals	+19.1	+17.0
Electrical Products	+ 5.9	+ 4.2
Engine Parts	+ 9.9	+ 7.0
Equipment	+12.5	+ 8.2
Tools	+12.6	+ 8.7
Total Industry	+10.0	+ 6.8
% of Industry Forecasting Increased Sales	89.7	86.0
Average Increase	+11.5	+ 9.4
% of Industry Forecasting Decreased Sales	6.6	12.5
Average Decrease	- 7.4	- 5.9
% of Industry Forecasting No Change	3.7	1.5
ANNUAL SALES		
Under \$5,000,000	+11.5	+10.9
\$5,000,000 to \$25,000,000	+11.5	+ 9.0
\$25,000,001 to \$75,000,000	+10.1	+11.2
Over \$75,000,000	+ 7.5	+ 4.0

Source: Motor & Equipment Manufacturers Association.

United States Car Production By Model Year, 1959 to 1984

Year	Cars	Year	Cars
1984	8,315,780	1971	7,221,290
1983	5,768,893	1970	7,595,411
1982	5,447,135	1969	8,440,765
1981	6,639,954	1968	8,402,870
1980	7,085,480	1967	7,666,898
1979	9,526,024	1966	8,606,166
1978	8,995,418	1965	7,882,679
1977	9,159,100	1964	7,892,090
1976	8,114,376	1963	7,339,992
1975	6,523,880	1962	6,686,749
1974	8,125,488	1961	5,407,256
1973	9,915,802	1960	6,011,482
1972	8,589,049	1959	5,566,527

Source: Reprinted by permission from *Automotive News*. Copyright 1985.

Latest Financial Rankings of

Automobile Parts—Miscellaneous

Figures Apply to 1983 With Certain Exceptions, As Noted

REVENUES (\$ MILL.)			NET INCOME (\$ MILL.)		
RANK	COMPANY	'83 AMT	RANK	COMPANY	'83 AMT
1	Federal-Mogul Corp.	747.00	1	Echlin, Inc.	43.80
2	Echlin, Inc.	689.00	2	Federal-Mogul Corp.	39.00
3	Guardian Industries Corp.	464.80	3	Guardian Industries Corp.	38.10
4	Bearings, Inc.	452.00	4	Sealed Power Corp.	29.10
5	Sealed Power Corp.	424.60	5	Standard Products Co.	22.20
6	Allen Group, Inc.	352.40	6	Standard Motor	21.10
7	Standard Products Co.	326.30	7	Modine Manufacturing Co.	12.70
8	Raymark Corp.	238.30	8	Bearings, Inc.	11.00
9	Modine Manufacturing Co.	225.50	9	Sparton Corp.	7.80
10	Hayes-Albion Corp.	218.50	10	Wynn's International, Inc.	6.40
11	Standard Motor	205.90	11	Allen Group, Inc.	6.20 ¹
12	Wynn's International, Inc.	188.00	12	Simpson Industries, Inc.	5.60
13	Douglas & Lomason Co.	162.70	13	Superior Industries	4.30
14	Intermark, Inc.	161.20	14	Hayes-Albion Corp.	4.00
15	Facet Enterprises, Inc.	148.90	15	Arrow Automotive	3.70
16	Sparton Corp.	142.20	16	Intermark, Inc.	3.20
17	Simpson Industries, Inc.	130.50	16	Twin Disc, Inc.	3.20
18	Kysor Industries Corp.	119.20	18	Kysor Industrial Corp.	3.00
19	Twin Disc, Inc.	115.40	19	Trico Products Corp.	2.70
20	Trico Products Corp.	113.40	20	Hastings Manufacturing	2.10
21	Republic Automotive	103.10	21	Cascade Corp.	1.90
22	Lamson & Sessions Co.	99.60	21	Howell Industries, Inc.	1.90
23	Arrow Automotive	97.10	23	Douglas & Lomason Co.	1.40
24	Champion Parts	94.70	23	Republic Automotive	1.40
25	Superior Industries	85.20	25	Braun Engineering Co.	1.20
26	Cascade Corp.	67.70	26	Metex Corp.	1.10
27	D.A.B. Industries, Inc.	66.40	27	Champion Parts	0.40
28	LSB Industries, Inc.	63.90	28	D.A.B. Industries, Inc.	d0.20
29	Braun Engineering Co.	63.00	29	Redlaw Industries, Inc.	d0.50
30	Hastings Manufacturing	55.50	30	Facet Enterprises, Inc.	d4.90
31	Howell Industries, Inc.	40.50	31	LSB Industries, Inc.	d6.40
32	Redlaw Industries, Inc.	37.60	32	Raymark Corp.	d16.00
33	Metex Corp.	14.90	33	Lamson & Sessions Co.	d23.10

Automobile Parts—Major (1983)

REVENUES (\$ MILL.)			NET INCOME (\$ MILL.)		
RANK	COMPANY	'83 AMT	RANK	COMPANY	'83 AMT
1	Dana Corp.	2,865.00	1	Dana Corp.	109.10
2	Eaton Corp.	2,674.10	2	Genuine Parts Co.	103.60
3	Genuine Parts Co.	2,068.20	3	Eaton Corp.	93.30
4	Cummins Engine Co., Inc.	1,604.70	4	Libbey-Owens-Ford Co.	40.40
5	Libbey-Owens-Ford Co.	1,167.70	5	Sheller-Globe Corp.	34.80
6	Timken Co.	937.30	6	Champion Spark Plug Co.	27.00
7	Smith (A.O.) Corp.	853.40	7	Arvin Industries, Inc.	18.30
8	Sheller-Globe Corp.	816.40	8	Smith (A.O.) Corp.	13.60
9	Champion Spark Plug Co.	764.40	9	Barnes Group, Inc.	10.10
10	Arvin Industries, Inc.	600.60	10	Mr. Gasket Co.	7.70
11	Barnes Group, Inc.	442.10	11	Cummins Engine Co., Inc.	5.20
12	Acklands Ltd.	260.10	12	Acklands Ltd.	3.80
13	Mr. Gasket Co.	74.00	13	Timken Co.	0.20

Publicly-Owned Automotive Firms

Automobile Parts—Miscellaneous

Figures Apply to 1983 With Certain Exceptions, As Noted

OPERATING PROFIT MARGIN (%)		
RANK	COMPANY	'83 AMT
1	Standard Motor	18.70
2	Guardian Industries Corp.	18.40
3	Sealed Power Corp.	12.70
4	Standard Products Co.	12.00
5	Modine Manufacturing Co.	11.20
6	Echlin, Inc.	11.10
7	Federal Mogul Corp.	9.50
8	Sparton Corp.	9.00
9	Intermark, Inc.	8.00
10	Howell Industries, Inc.	7.80
11	Hastings Manufacturing	7.70
12	Arrow Automotive	7.60
13	Simpson Industries, Inc.	7.40
14	Superior Industries	7.20
15	Metex Corp.	6.80
16	Cascade Corp.	6.40
17	Wynn's International, Inc.	6.30
18	Kysor Industrial Corp.	6.10
19	Bearings, Inc.	5.60
20	Champion Parts	5.50
21	Hayes-Albion Corp.	4.80
22	Allen Group, Inc.	4.30
23	Braun Engineering Co.	3.90
24	Twin Disc, Inc.	3.50
25	Republic Automotive	2.70
26	D.A.B. Industries, Inc.	2.10
27	Douglas & Lomason Co.	1.70
28	Raymark Corp.	1.60
29	Trico Products Corp.	0.70
30	Redlaw Industries, Inc.	0.30
31	Facet Enterprises, Inc.	
31	Lamson & Sessions Co.	
31	LSB Industries, Inc.	
Average		6.40

RETURN ON CAPITAL (%)		
RANK	COMPANY	'83 AMT
1	Standard Products Co.	20.35
2	Howell Industries, Inc.	18.74
3	Standard Motor	17.76
4	Sparton Corp.	13.97
5	Superior Industries	12.88
6	Echlin, Inc.	12.54
7	Sealed Power Corp.	12.12
8	Simpson Industries, Inc.	12.04
9	Modine Manufacturing Co.	10.54
10	Hastings Manufacturing	9.92
11	Arrow Automotive	8.96
12	Guardian Industries Corp.	8.83
13	Federal Mogul Co.	8.32
14	Metex Corp.	7.71
15	Wynn's International, Inc.	7.35
16	Hayes-Albion Corp.	6.37
17	Bearings, Inc.	6.29
18	Braun Engineering Co.	4.88
19	Kysor Industrial Corp.	4.78
20	Cascade Corp.	4.50
21	Allen Group, Inc.	4.45
22	Douglas & Lomason Co.	3.81
23	Twin Disc, Inc.	3.78
24	Republic Automotive	3.13
25	Trico Products Corp.	3.04
26	Intermark, Inc.	2.34
27	Champion Parts	0.77
28	D.A.B. Industries, Inc.	
28	Facet Enterprises, Inc.	
28	Lamson & Sessions Co.	
28	LSB Industries, Inc.	
28	Reymark Corp.	
28	Redlaw Industries, Inc.	
Average		7.00

Automobile Parts—Major (1983)

OPERATING PROFIT MARGIN (%)		
RANK	COMPANY	'83 AMT
1	Mr. Gasket Co.	22.20
2	Genuine Parts Co.	9.70
3	Dana Corp.	8.70
4	Barnes Group, Inc.	7.80
5	Champion Spark Plug Co.	7.10
6	Eaton Corp.	6.50
7	Sheller-Globe Corp.	6.40
8	Libbey-Owens-Ford Co.	6.30
9	Arvin Industries, Inc.	5.50
10	Cummins Engine Co., Inc.	4.10
11	Acklands Ltd.	3.60
12	Smith (A.O.) Corp.	3.50
13	Timken Co.	0.20
Average		7.00

RETURN ON CAPITAL (%)		
RANK	COMPANY	'83 AMT
1	Genuine Parts Co.	15.54
2	Mr. Gasket Co.	12.00
3	Dana Corp.	6.92
4	Arvin Industries, Inc.	6.82
5	Champion Spark Plug Co.	6.68
6	Eaton Corp.	6.17
7	Libbey-Owens-Ford Co.	6.10
8	Barnes Group, Inc.	5.51
9	Sheller-Globe Corp.	5.22
10	Smith (A.O.) Corp.	4.61
11	Acklands Ltd.	4.15
12	Cummins Engine Co., Inc.	0.57
13	Timken Co.	0.09
Average		6.20

Source: Moody's Industry Review (Jan. 11, 1985 and Feb. 22, 1985). 'Figures apply to 1984. dSignifies net loss.

How ASIA's Heavy Duty Distributor Measured Up in Sales, Profits, Etc.

Figures Apply to 1983

	Median Distributor (1983)
SALES PERFORMANCE MEASURES	
Average Sales Volume (Merchandise Sales)	\$2,600,000
Percent of Sales Change Over Previous Year	(Up) 1.5%
Cash Sales as Percent of Total Merchandise Sales	9.9%
PROFITABILITY PERFORMANCE MEASURES	
Gross Profit as a Percent of Net Merchandise Sales	31.3%
Net Profit (Before Taxes) as a Percent of Net Merchandise Sales	2.1%
Net Profit (After Taxes) as a Percent of Net Merchandise Sales	1.9%
ASSET MANAGEMENT MEASURES	
Average Inventory Turnover Rate	3.7 (Times)
Number of Days Average Inventory Carried	99 (Days)
Overall Average Collection Period	42 (Days)
FINANCIAL MANAGEMENT MEASURES	
Total Debt as a Percent of Net Worth	237.70%
Ratio of Total Assets to Net Worth	3.38 to 1 ¹
Current Ratio (Assets to Liabilities)	2.00 to 1 ¹
OPERATING EXPENSES	
Total Non-Shop Operating Expense as a Percent of Net Merchandise Sales	27.0%
Total Non-Shop Operating Expense as a Percent of Gross Profit From Merchandise Sales	89.5%
PERSONNEL MEASURES	
Sales Volume Per Non-Shop Employee	\$155,610
Average Payroll Per Non-Shop Employee	\$ 21,400
MACHINE SHOP PERFORMANCE	
Shop Sales Per Shop Employee	\$ 27,580
Average Wage or Salary Per Shop Employee	\$ 16,670
Gross Profit Per Machine Shop Employee	41.9%
Shop Net Profit as a Percent of Shop Labor Sales	19.9%

Source: 1984 Edition of *Management Performance Measurement for ASIA Heavy Duty Distributors*, published by the Automotive Service Industry Association. ¹Ratios relate dollars to dollars. In the ratio of total assets to net worth, for instance, there was \$3.38 of total assets to every \$1.00 of net worth.

Milestones in Production Of Motor Trucks and Buses¹

10 millionth	1938
25 millionth	1953
50 millionth	1971
75 millionth	1979

Source: Motor Vehicle Manufacturers Association of the U.S., Inc. ¹Based on total U.S. factory sales data.

Productivity of People Working For ASIA Heavy Duty Distributors

	Median Distributor (1983)
Non-Shop Personnel	
Parts & Merchandise Sales Per Non-Shop Employee	\$155,610
Parts & Merchandise Gross Profit Per Non-Shop Employee	\$ 50,760
Personnel Productivity Index: Gross Profit to Payroll	2.90 to 1 ¹
Parts & Merchandise Sales Per Outside Salesman	\$800,009
Parts & Merchandise Gross Profit Per Outside Salesman	\$245,170
Non-Shop Payroll as Percent of Parts & Merchandise Sales	10.99%
Non-Shop Payroll as Percent of Parts & Merchandise Gross Profit	34.56%
Non-Shop Payroll as Percent of Non-Shop Operating Expenses	42.01%
Average Payroll Per Non-Shop Employee	\$ 21,400
Salary & Bonus of Highest Paid Executive	\$ 50,580
Salary & Bonus of Second Highest Paid Executive	\$ 37,300
Salary & Bonus of Highest Paid Executive as Percent of Parts & Merchandise Sales	1.78%
Salary & Bonus of Highest Paid Executive as Percent of Gross Profit Margin	6.51%

Source: 1984 Edition of *Management Performance Measurement for ASIA Heavy Duty Distributors*, published by the Automotive Service Industry Association. ¹Ratios relate dollars to dollars. In the Personnel Productivity Index, for example, there was \$2.90 of gross profit for every \$1.00 of payroll.

Annual Factory Sales of Motor Vehicles From U.S. Plants

	Passenger Cars	Motor Trucks and Buses	Total Vehicles
1984	7,621,176	3,075,325	10,696,501
1983	6,739,223	2,413,897	9,153,120
1982	5,049,184	1,906,455	6,955,639
1981	6,255,340	1,700,908	7,956,248
1980	6,400,026	1,667,283	8,067,309
1979	8,419,226	3,036,706	11,455,932
1978	9,165,190	3,706,239	12,871,429
1977	9,200,849	3,441,521	12,642,370
1976	8,500,305	2,979,476	11,479,781
1975	6,712,852	2,272,160	8,985,012
1974	7,331,256	2,727,313	10,058,569
1973	9,657,647	2,979,688	12,637,335
1972	8,823,938	2,446,807	11,270,745
1971	8,584,592	2,053,146	10,637,738
1970	6,546,817	1,692,440	8,239,257

Source: Motor Vehicle Manufacturers Association of the U.S., Inc.

Jobber Services Provided to the Wholesale Trade

	Yes		No	
	Percent Respondents	Sales per Square Foot	Percent Respondents	Sales per Square Foot
Store's own credit	89%	\$146	11%	\$105
VISA/MasterCard	36	145	64	137
Delivery	78	148	22	97
Quantity discounts	68	155	32	107
DIY discounts	18	125	82	146
Educational clinics	51	134	49	139
Phone orders	86	139	14	209
Return goods privileges	90	146	10	145
Special orders	88	147	12	129

Source: Reprinted with permission from *Jobber Report*, published by the Automotive Parts & Accessories Assn.

Jobber Services Provided to the Retail Trade

	Yes		No	
	Percent Respondents	Sales per Square Foot	Percent Respondents	Sales per Square Foot
Store's own credit	38%	\$131	62%	\$151
VISA/MasterCard	68	154	32	116
Delivery	17	149	83	109
Quantity discounts	33	142	67	141
DIY discounts	55	134	45	151
Educational clinics	11	127	89	144
Phone orders	60	134	40	145
Return goods privileges	83	142	17	144
Special orders	82	150	18	113

Source: Reprinted with permission from *Jobber Report*, published by the Automotive Parts & Accessories Assn.

Percentage of Jobbers Selling Specified PBE Lines

	Percentage of Respondents
1. Body fillers, adhesive, sealing compounds & tape	82.5
2. Sanding paper, discs & grinding wheels, buffing stones	78.8
3. Windshield sealers	78.1
4. Leather & upholstery cleaners	76.2
5. Rubbing compounds (paint)	75.8
6. Polishing equipment & supplies	69.5
7. Paint-lacquer, enamel, primer & additives	69.1
8. Paint masking supplies/machines	68.8
9. Paint (touch-up)	67.7

Source: JOBBER TOPICS Forum Report, August 1984.

Imported New Car Sales In U.S. Since 1979

	1984	1983	1982	1981	1980	1979
Alfa Romeo	3,702	3,002	2,194	2,301	3,000	4,011
Audi	71,237	47,936	45,954	50,817	42,483	42,709
BMW	70,897	59,242	52,393	41,761	37,071	34,521
Capri	—	—	—	—	—	—
Challenger/Conquest	3,725	14,024	14,128	12,690	12,924	14,166
Chevrolet Spectrum	2,007	—	—	—	—	—
Chevrolet Spring	10,927	—	—	—	—	—
Champ/Colt	32,819	34,513	—	42,128	55,474	48,680
Colt	36,560	39,158	75,031	42,796	50,689	62,705
DeLorean	—	—	2,830	3,009	—	—
Ferrari	N.A.	N.A.	N.A.	N.A.	779	679
Fiat	N.A.	6,184	14,113	32,185	37,814	58,934
Fiesta	—	—	—	32,856	68,595	78,109
Honda	374,819	350,670	365,865	370,705	375,388	353,291
Isuzu	17,233	20,731	15,462	17,805	—	—
Jaguar	18,044	15,815	10,349	4,695	3,029	3,746
Lancia	—	637	1,174	1,068	2,100	1,602
Maserati Biturbo	2,023	—	—	—	—	—
Mazda	169,666	173,388	163,150	166,105	161,623	156,533
Mercedes-Benz	79,222	73,692	65,963	63,059	53,790	52,819
MG	—	—	—	3,712	13,730	26,025
Mitsubishi	39,104	32,755	3,950	—	—	—
Nissan	485,298	521,902	470,246	464,805	516,890	472,252
Opel	—	—	—	—	—	13,815
Peugeot	20,007	15,241	14,323	16,937	12,930	11,688
Porsche	20,024	21,831	14,407	11,241	10,490	13,818
Renault	12,243	33,229	37,540	30,869	25,365	18,862
Rolls-Royce	1,083	1,046	N.A.	1,158	942	1,002
Rover	—	—	—	—	481	—
Saab	33,631	26,323	18,463	14,613	13,558	15,142
Sapporo/Conquest	3,344	11,571	13,068	13,326	10,263	12,322
Subaru	157,385	156,840	150,335	152,062	142,968	127,871
Toyota	557,981	555,766	530,246	576,491	582,204	507,816
Triumph	—	—	—	9,768	14,939	12,733
Vista	15,270	4,303	—	—	—	—
Volkswagen	103,479	77,009	67,352	82,173	90,923	125,100
Volvo	99,541	88,857	72,352	64,477	56,999	56,027
TOTAL	2,441,341	2,386,064	2,220,911	2,326,376	2,396,934	2,327,932

Source: Reprinted with permission from *Automotive News*. Copyright 1985.

5 Leading Vehicle Producers— Worldwide, 1982 to 1984

	1984	1983	1982
1. General Motors	8,256,000	7,769,000	6,244,000
2. Ford Motor Co.	5,584,651	4,934,231	4,267,587
3. Toyota	3,429,249	3,182,614	3,155,784
4. Nissan	2,481,686	2,462,436	2,557,269
5. Renault	2,362,300	2,237,185	1,992,985

Source: Reprinted with permission from *Automotive News*. Copyright 1985.

U.S. Car Production:

	Total Output 1984	Pct. of Total Output	Total Output 1983	Pct. of Total Output	Pct. of Change '84 vs. '83
AMERICAN MOTORS	192,196	2.47	200,381	2.82	-0.35
AMC Total			4,071	0.06	
Concord			12	0.00	
Eagle			4,059	0.06	
Renault Total	192,196	2.47	196,310	2.76	-0.29
Alliance	110,173	1.42	153,877	2.16	-0.74
Encore	82,023	1.05	42,433	0.60	+0.45
CHRYSLER CORP.	1,252,216	16.10	903,553	12.70	+3.40
Plymouth Total	380,652	4.89	310,748	4.37	+0.52
Horizon	159,247	2.04	117,731	1.66	+0.38
Reliant ¹	174,793	2.25	186,445	2.62	-0.37
Caravelle	25,348	0.33	5,317	0.07	+0.26
Gran Fury	21,264	0.27	1,255	0.02	+0.25
Chrysler Total	403,699	5.19	234,203	3.29	+1.90
LeBaron	116,459	1.51	85,868	1.20	+0.31
LeBaron GTS	10,589	0.15			+0.15
Laser	70,066	0.90	23,603	0.33	+0.57
New Yorker/E-Class	89,783	1.13	104,999	1.48	-0.35
Fifth Avenue	116,802	1.50	19,733	0.28	+1.22
Dodge Total	467,865	6.02	358,602	5.04	+0.98
Omni	146,350	1.88	126,437	1.78	+0.10
Aries ¹	144,448	1.86	144,006	2.02	-0.16
Daytona	52,974	0.68	19,399	0.27	+0.41
Dodge 400			26,442	0.37	
Dodge 600	74,704	0.96	41,077	0.58	+0.38
Lancer	8,289	0.11			+0.11
Diplomat	41,100	0.53	1,241	0.02	+0.51
FORD MOTOR CO.	1,775,315	22.83	1,820,245	25.59	-2.76
Ford Division	1,145,116	14.72	1,214,222	17.07	-2.35
Escort	341,757	4.39	343,632	4.83	-0.44
Fairmont			23,728	0.33	
Mustang	140,338	1.80	124,225	1.75	+0.05
LTD	225,933	2.90	179,192	2.52	+0.38
Thunderbird	146,186	1.88	186,566	2.62	-0.74
Crown Victoria	83,081	1.07	124,730	1.75	-0.68
EXP	42,501	0.55	15,455	0.22	+0.33
Tempo	165,320	2.13	216,704	3.05	-0.92
L-M Division	630,199	8.11	606,023	8.52	-0.41
Mercury Total	461,495	5.94	499,495	7.02	-1.08
Lynx	69,778	0.90	89,354	1.25	-0.35
Capri	18,254	0.23	24,697	0.35	-0.12
Zephyr			8,601	0.12	
Marquis	121,049	1.56	99,391	1.40	+0.16
Cougar	116,536	1.50	126,395	1.78	-0.28
Grand Marquis	89,312	1.15	77,147	1.08	+0.07
LN7			2,210	0.03	
Topaz	46,566	0.60	71,700	1.01	
Lincoln Total	168,704	2.17	106,528	1.50	-0.41
Continental	36,105	0.46	13,513	0.19	+0.27
Lincoln	106,998	1.38	58,872	0.83	+0.55
Mark VII	25,601	0.33	34,143	0.48	-0.15

1984 Compared to 1983

	Total Output 1984	Pct. of Total Output	Total Output 1983	Pct. of Total Output	Pct. of Change '84 vs. '83
GENERAL MOTORS	4,344,611	55.86	4,034,629	56.73	-0.87
Buick Total	987,833	12.70	905,608	12.73	-0.03
Skylark	110,649	1.42	112,843	1.59	-0.17
Skyhawk	127,327	1.64	79,169	1.11	+0.53
Somerset Regal	28,352	0.36	...	...	+0.36
Century	227,973	2.93	177,076	2.49	+0.44
Regal	174,120	2.24	234,179	3.29	-1.05
LeSabre/Electra (rwd)	178,500	2.30	249,244	3.50	-1.20
Riviera	53,093	0.68	52,503	0.74	-0.06
Electra (fwd)	87,819	1.13	594	0.01	+1.12
Cadillac Total	328,418	4.22	308,497	4.34	-0.12
Cimarron	14,362	0.19	21,021	0.29	-0.10
Seville	38,683	0.50	34,622	0.49	+0.01
Eldorado	75,957	0.97	72,299	1.02	-0.05
Cadillac	117,150	1.50	180,422	2.54	-1.04
DeVille (fwd)	82,266	1.06	133	0.00	+1.06
Chevrolet Total	1,457,066	18.73	1,307,429	18.38	+0.35
Chevette	174,377	2.24	201,841	2.84	-0.60
Cavalier	400,254	5.14	308,461	4.33	+0.81
Celebrity	280,653	3.61	165,595	2.33	+1.28
Camaro	230,082	2.96	193,121	2.71	+0.25
Citation	104,045	1.34	86,878	1.22	+0.12
Malibu/El Camino	...	...	107,208	1.51	...
Monte Carlo	97,922	1.26	124,926	1.76	-0.50
Chevrolet	134,072	1.72	91,225	1.28	+0.44
Corvette	35,661	0.46	28,174	0.40	+0.06
Oldsmobile Total	1,065,528	13.70	1,083,262	15.23	-1.53
Omega	29,288	0.38	59,965	0.84	-0.46
Firenza	67,986	0.87	54,799	0.77	+0.10
Cutlass Supreme	247,458	3.18	342,929	4.82	-1.64
Cutlass Ciera	251,506	3.23	216,898	3.05	+0.18
88/98 (rwd)	282,378	3.63	365,044	5.13	-1.50
Olds 98 (fwd)	109,321	1.41	494	0.01	+1.40
Calais	33,195	0.43	...	...	+0.43
Toronado	44,396	0.57	43,133	0.61	-0.04
Pontiac Total	505,766	6.51	429,833	6.05	+0.46
Acadian ¹	14,396	0.19	15,064	0.21	-0.02
2000 Sunbird	136,582	1.76	114,666	1.61	+0.15
1000	25,063	0.32	42,175	0.60	-0.28
Firebird	108,396	1.39	99,629	1.40	-0.01
Phoenix	14,195	0.18	25,053	0.35	-0.17
6000	106	0.00	...	...	...
Grd. Prix/Bon'vle	20,003	0.26	93,084	1.31	-1.05
Parisienne	48,356	0.62	12,457	0.18	+0.44
Fiero	114,002	1.47	27,705	0.39	+1.08
Grand Am	24,667	0.32	...	...	+0.32
HONDA	138,578	1.78	55,337	0.78	+1.00
NUMMI (Nova)	20	0.00	...	...	...
VOLKSWAGEN	74,785	0.96	98,207	1.38	-0.42
Total U.S. Cars	7,777,721	100.0	7,112,352	100.00	

Source: Reprinted by permission from *Automotive News*. Copyright 1985. ¹Includes 1,980 Aries, 2,410 Reliants built in Mexico.

Yearly Statistics of International Show¹

Year	Place	Exhibitors	Booths	Net Square Ft. (Booth Space)	Attendance Total
1933	Chicago	268	562	62,324	10,781
1934	Cleveland	336	798	72,261	13,348
1935	Atlantic City	350	850	92,400	12,761
1936	Chicago	357	915	98,632	13,476
1937	Chicago	380	1,012	110,095	13,045
1938	Chicago	355	947	103,412	15,526
1939	Chicago	351	961	108,413	13,366
1940	Chicago	352	969	117,331	12,925
1946	Atlantic City	430	1,169	126,888	13,712
1947	Chicago	486	1,327	171,978	19,888
1948	Chicago	520	1,444	178,510	19,534
1950	Chicago	522	1,385	172,463	17,067
1952	Atlantic City	460	1,275	143,148	14,049
1953 ²	Chicago	289	440	44,000	4,288
1954 ³	Chicago	478	984	111,978	12,880
1959	Chicago	459	1,004	118,404	21,614
1960	New York	487	1,143	119,066	34,087
1961	Los Angeles	511	1,157		44,309 ⁴
1962	Chicago	504	1,275	146,926	29,090
1963	Philadelphia	518	1,347	138,844	22,975
1964	San Francisco	579	1,415		53,165 ⁴
1965	Chicago	542	1,422	148,980	18,177
1966	New York	505	1,139	116,887	17,640
1967	Chicago	548	1,419	146,050	17,379
1968	Las Vegas	560	1,488		19,512
1969	Chicago	516	1,403	145,220	18,449
1970	Las Vegas	576	1,514	136,780	21,157
1971	Chicago	496	1,407	140,700	18,989
1972	Chicago	526	1,444	158,000	20,226
1973	Las Vegas	559	1,579	157,900	25,190
1974	Chicago	510	1,523	157,450	17,219
1975	Chicago	542	1,523	157,550	20,824
1976	San Francisco	560	1,525	152,500	21,795
1977	Chicago	579	1,643	165,200	20,958
1978	Chicago	646	"	193,650	23,877
1979	Las Vegas	746	2,016	201,600	28,237
1980	Chicago	684	"	201,880	23,156
1981	Chicago	659	"	191,000	23,765
1982	Las Vegas	756	2,035	203,500	27,480
1983	Chicago	639	1,921	192,130	30,572
1984	Chicago	705	"	201,950	32,322 ⁵
1985	Las Vegas	791	2,215	221,500	30,555

Sources: Hall-Erickson, Inc. and JOBBERT TOPICS. ¹Before 1960, the event was known as the Automotive Service Industries Show. The "I", added in 1960, is for "International." Since 1968, whenever shows were held in Las Vegas or San Francisco, the IASI has been co-sponsored by the Pacific Automotive Show. ²Indicates booth conference only. ³Indicates trade show plus booth conference. ⁴Attendance figures for 1961 and 1964 are "turnstile" counts, not an actual badge count. For other years from 1962-1983, the figure is a badge count. ⁵IASI officials discontinued reporting the number of show booths at Chicago Shows in 1978. ⁶Attendance figure for the 1984 Show is based on total registrations, not a badge count.

Regional Automotive Show Statistics

Eastern Automotive Aftermarket Show

Year	Place	Exhibitors	Booths	Net Square Ft. (Booth Space)	Total Attendance
1970	Atlantic City	243	498	49,800	10,571
1973	Atlantic City	362	730	73,850	13,957
1976	Atlantic City	417	819	83,600	15,615
1979	Atlantic City	556	960	119,200	16,043
1982	Atlantic City	589	12,115	121,150	17,266
1985	Atlantic City	626	14,135	141,350	28,589

New England Automotive Show

1975	Woburn, Mass.	231	306	33,500	18,553
1978	Woburn, Mass.	265	365	65,000	17,685
1980	Woburn, Mass.	255	360	100,000	13,016
1984	Woburn, Mass.	253	400	40,000	13,773

Pacific Automotive Show

1972	San Francisco	282	531	53,100	9,459
1973 ¹	Las Vegas	559	1,579	157,900	25,190
1974	Los Angeles	332	680	68,000	10,071
1975	Anaheim	301	550	55,000	10,226
1976 ¹	San Francisco	560	1,525	152,500	21,795
1977	Las Vegas	323	670	67,000	8,998
1978	San Francisco	311	661	66,100	9,061
1979 ¹	Las Vegas	746	2,016	201,600	28,237
1980	Anaheim	341	742	74,200	11,086
1981	San Francisco	322	696	69,600	9,069
1982 ¹	Las Vegas	756	2,035	203,500	27,480
1983	Reno	325	665	66,500	9,264
1984	Anaheim	305	665	66,500	11,705
1985	Las Vegas	791	2,215	221,500	30,555

Sources: Hall-Erickson, Inc. (producer of the Eastern Show); New England Regional Automotive Show and the Pacific Automotive Show. ¹The 1973, 1976, 1979, 1982 and 1985 figures relate to PAS-IASI Shows, which involve greater participation by exhibitors and visitors.

Milestones in Production Of Cars¹

Units	Year
1 millionth	1912
10 millionth	1920
50 millionth	1935
100 millionth	1952
150 millionth	1960
200 millionth	1967
250 millionth	1972
300 millionth	1979

Source: Motor Vehicle Manufacturers Association of the U.S., Inc. ¹Based on U.S. total factory sales data.

What It Costs to Own, Operate Average Car in 1985

Figures Based on Composite Costs*

Cost Per Mile

Cost Item	1985
Gasoline (unleaded) and oil	5.57 cents
Tires	.65 cents
Maintenance	1.20 cents

Fixed Costs Per Year

Comprehensive insurance (\$100 ded.)	\$ 75.00
\$250 deductible collision insurance	177.00
Property damage and liability (\$100/300/50M)	213.00
License, registration, taxes	110.00
Depreciation	1,262.00
Finance charge (20% down, 13.5% for 4 years)	534.00
TOTAL COST PER MILE	23.2 cents
TOTAL COST PER YEAR	\$3,484.00

Source: American Automobile Association. The AAA study used cars that were equipped with standard and optional accessories, automatic transmission, power steering, power disc brakes, AM/FM stereo, cruise control and rear window defogger. Gasoline costs were based on a \$1.262 per-gallon charge for unleaded fuel. The study based insurance figures on personal, rather than business use of a vehicle. The cars were driven less than 10 miles to work. There were no youthful drivers. Depreciation costs were based on trade-in value at the end of four years or at 60,000 miles. *The costs for operating a Chevrolet Chevette, Celebrity and Impala were averaged to arrive at these figures.

Vehicle Production Milestones¹

(Cars, Trucks & Buses Combined)

Units	Year
100,000th	1906
1 millionth	1912
10 millionth	1920
50 millionth	1931
100 millionth	1948
150 millionth	1955
200 millionth	1962
250 millionth	1968
300 millionth	1972
400 millionth	1982

Source: Motor Vehicle Manufacturers Association of the U.S., Inc. ¹Based on U.S. total factory sales data.

Automotive Wholesaler Failures

Year	Number	Liabilities	Year	Number	Liabilities
1946	1	\$ 47,000	1965	84	\$ 4,488,000
1947	17	456,000	1966	98	5,632,000
1948	26	892,000	1967	91	9,211,000
1949	44	1,150,000	1968	72	8,411,000
1950	55	1,083,000	1969	49	7,383,000
1951	23	330,000	1970	61	4,617,000
1952	22	529,000	1971	59	8,478,000
1953	28	1,010,000	1972	46	4,452,000
1954	39	1,015,000	1973	55	10,295,000
1955	53	1,523,000	1974	60	7,024,000
1956	41	2,699,000	1975	65	12,122,000
1957	45	1,470,000	1976	57	30,272,000
1958	42	1,275,000	1977	48	27,849,000
1959	50	1,744,000	1978	43	6,270,000
1960	77	4,191,000	1979	36	47,734,000
1961	89	3,744,000	1980	109	47,730,000
1962	80	4,696,000	1981	112	29,682,000
1963	74	3,917,000	1982	138	74,386,000
1964	94	3,452,000	1983	183	59,151,000

Source: Economic Analysis Dept., Dun & Bradstreet Corp.

Parts, Service Sales of Franchised New Car Dealerships: \$30.6 Billion

	1983	1984	Percent Change
SERVICE LABOR SALES			
Customer Mechanical	\$ 4,365,000,000	\$ 4,810,000,000	+10.2
Customer Body	1,917,000,000	2,189,000,000	+14.2
Warranty	1,484,000,000	1,945,000,000	+24.3
Sublet	931,000,000	1,094,000,000	+17.6
Internal	1,540,000,000	1,794,000,000	+16.5
Other	841,000,000	993,000,000	+18.0
TOTAL SERVICE LABOR	11,078,000,000	12,725,000,000	+14.9
PARTS SALES			
Customer Mechanical	\$ 3,199,000,000	\$ 3,498,000,000	+ 9.4
Customer Body	1,962,000,000	2,224,000,000	+13.4
Wholesale	5,080,000,000	5,704,000,000	+12.3
Counter	1,301,000,000	1,363,000,000	+ 4.7
Warranty	1,693,000,000	2,314,000,000	+36.6
Internal	1,562,000,000	1,866,000,000	+19.0
Other	878,000,000	969,000,000	+10.3
TOTAL PARTS	15,681,000,000	17,938,000,000	+14.4
TOTAL SERVICE & PARTS	26,759,000,000	30,663,000,000	+14.6

Source: National Automobile Dealers Assn., Industry Analysis Div.

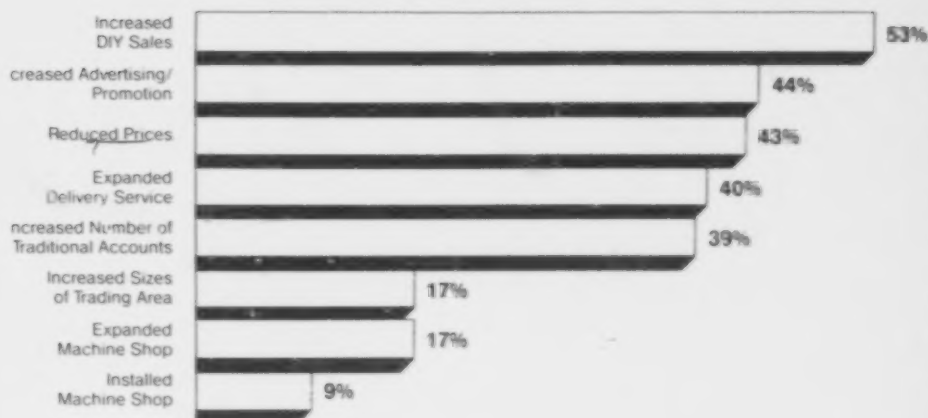
United States Motor Truck Registrations by State

State	Privately Owned ¹		Privately and Publicly Owned ²	
	1982	1983	1982	1983
Alabama	814,210	842,135	836,366	864,316
Alaska	110,005	122,721	117,014	130,123
Arizona	615,409	637,901	628,113	650,709
Arkansas	500,738	491,070	510,173	500,358
California	3,512,284	3,628,313	3,675,347	3,707,926
Colorado	634,043	684,586	653,131	704,024
Connecticut	131,386	128,987	149,384	146,757
Delaware	77,347	81,124	79,327	82,996
Florida	1,448,417	1,556,650	1,546,600	1,661,268
Georgia	869,865	1,024,274	906,766	1,061,017
Hawaii	50,541	50,592	54,803	54,927
Idaho	324,654	327,478	340,580	345,348
Illinois	1,335,112	1,535,175	1,363,491	1,561,330
Indiana	965,312	954,632	991,055	981,326
Iowa	649,022	689,490	669,914	707,397
Kansas	647,487	618,799	664,382	635,216
Kentucky	769,327	770,090	797,068	799,057
Louisiana	756,593	817,588	772,039	833,200
Maine	189,434	190,740	199,187	201,370
Maryland	446,589	468,660	461,998	484,589
Massachusetts	415,446	427,126	441,795	453,880
Michigan	1,163,346	1,187,355	1,224,535	1,249,193
Minnesota	895,550	831,085	922,955	857,870
Mississippi	362,384	354,450	370,161	363,168
Missouri	847,770	867,604	861,549	851,966
Montana	296,431	330,427	304,560	340,742
Nebraska	396,442	406,941	406,348	415,269
Nevada	184,314	190,752	194,875	201,566
New Hampshire	103,220	106,164	111,436	114,187
New Jersey	436,774	439,059	513,375	512,743
New Mexico	395,490	419,498	409,734	434,369
New York	937,373	965,450	1,000,587	1,024,802
North Carolina	1,065,916	1,069,112	1,107,031	1,111,010
North Dakota	263,306	266,117	270,456	273,455
Ohio	1,244,021	1,264,057	1,286,284	1,307,834
Oklahoma	950,847	968,432	980,955	999,771
Oregon	580,040	600,895	598,316	632,784
Pennsylvania	1,033,728	1,033,970	1,078,473	1,078,324
Rhode Island	72,255	73,387	77,214	78,010
South Carolina	428,533	451,265	444,376	467,402
South Dakota	225,983	226,273	236,487	236,761
Tennessee	569,447	588,161	603,618	621,417
Texas	3,206,475	3,330,285	3,356,546	3,482,625
Utah	315,302	327,057	325,248	337,215
Vermont	75,741	79,701	79,596	83,578
Virginia	516,591	528,845	539,052	551,992
Washington	901,325	938,709	930,429	965,144
West Virginia	320,465	356,989	345,799	385,222
Wisconsin	558,733	622,368	589,938	654,067
Wyoming	199,435	202,419	206,301	209,523
District of Columbia	11,437	11,239	15,798	15,638
TOTAL	33,821,895	35,086,197	35,252,765	36,547,781

Source: U.S. Federal Highway Administration, Table MV-1. ¹Excludes farm trucks registered in certain states and restricted to use in vicinity of owner's farm. There were 58,790 such trucks in the 1983 count. ²Includes federal, state, county and municipal vehicles; excludes vehicles owned by military services. Note: Registrations shown here are not synonymous with vehicles in use. The latter expression implies a count of vehicles in operation over a period of time. Registrations, by contrast, are a count of transactions (license sales with transfers eliminated) during a specified period.

How Jobbers Fight Retail Competition

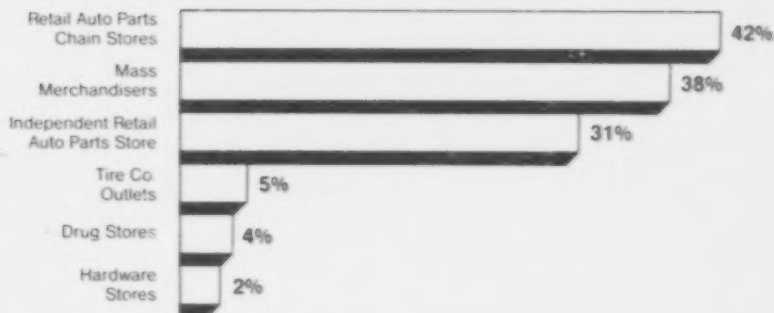
Percent Total Respondents



Source: JOBBER TOPICS Forum Report, April 1985.

Jobbers' Strongest Retail Competitors

Percent Total Respondents



Source: JOBBER TOPICS Forum Report, April 1985.

Profile of Establishments

State	Establishments Having Machine Shops	Paint/ Body Supplies	Heavy Duty Parts/ Supplies	Tires/ Accessories
Ala.	177	188	140	47
Alaska	4	16	15	2
Ariz.	127	85	84	30
Ark.	103	186	157	29
Calif.	848	407	576	173
Colo.	120	119	127	38
Conn.	119	119	90	40
Del.	27	25	17	6
D. of C.	1	3	2	—
Fla.	432	322	347	132
Ga.	211	277	200	52
Hawaii	21	35	22	10
Idaho	61	74	69	16
Ill.	575	501	336	136
Ind.	339	340	205	76
Iowa	209	321	215	78
Kan.	148	176	127	37
Ky.	158	221	135	57
La.	136	173	147	57
Maine	47	96	69	10
Md.	115	129	90	42
Mass.	229	246	153	63
Mich.	426	457	257	71
Minn.	207	269	159	50
Miss.	95	152	112	33
Mo.	273	347	242	94
Mont.	44	81	77	9
Neb.	102	141	76	30
Nev.	15	22	22	7
N.H.	48	75	41	14
N.J.	348	192	175	72
N.M.	50	70	68	19
N.Y.	549	540	439	213
N.C.	247	378	201	108
N.D.	46	64	53	15
Ohio	495	536	341	108
Okla.	131	147	133	41
Ore.	122	103	109	21
Pa.	460	623	371	160
R.I.	36	35	23	8
S.C.	124	155	97	35
S.D.	49	59	38	6
Tenn.	205	236	148	47
Texas	529	510	514	186
Utah	36	54	48	16
Vt.	26	63	28	10
Va.	136	236	166	81
Wash.	236	154	183	53
W. Va.	62	121	76	20
Wis.	268	303	156	60
Wyo.	28	45	35	7
P.R.	2	1	3	3
TOTAL	9,612	10,228	7,714	2,728

Influenced by JOBBER TOPICS

Replacement Parts/ Supplies	Ignition/ Electrical	Equipment/ Tools	Import Car Parts/ Supplies	Retail Sales	State
389	319	236	221	263	Ala.
32	29	24	23	25	Alaska
250	218	133	151	160	Ariz.
322	266	213	134	203	Ark.
1,647	1,385	896	1,058	1,232	Calif.
298	256	195	210	205	Colo.
270	233	168	191	199	Conn.
58	49	35	25	31	Del.
18	14	6	6	8	D. of C.
905	783	536	555	628	Fla.
546	447	312	254	335	Ga.
64	52	35	43	49	Hawaii
151	139	109	95	105	Idaho
1,038	892	633	640	555	Ill.
611	524	361	358	345	Ind.
551	489	367	339	284	Iowa
376	331	237	230	225	Kan.
395	322	229	165	191	Ky.
375	328	218	210	226	La.
163	142	90	100	96	Maine
306	248	181	162	186	Md.
512	406	275	288	298	Mass.
807	684	484	554	446	Mich.
385	327	260	224	206	Minn.
250	212	167	137	158	Miss.
682	589	451	403	405	Mo.
131	112	95	70	85	Mont.
233	207	161	125	120	Neb.
51	48	31	34	34	Nev.
112	99	67	73	84	N.H.
565	478	342	319	351	N.J.
138	127	94	100	98	N.M.
1,182	1,059	773	738	759	N.Y.
698	600	423	310	430	N.C.
105	92	86	72	59	N.D.
915	794	508	570	486	Ohio
332	287	235	173	193	Okla.
246	211	151	131	179	Ore.
1,116	931	651	582	637	Pa.
98	79	57	49	63	R.I.
295	273	188	164	219	S.C.
92	83	60	59	46	S.D.
441	369	252	203	312	Tenn.
1,426	1,196	799	818	815	Texas
126	106	84	76	79	Utah
77	63	46	45	53	Vt.
491	421	273	215	327	Va.
436	371	240	300	310	Wash.
152	130	95	71	89	W. Va.
499	435	318	327	258	Wis.
71	66	48	44	46	Wyo.
4	1	1	1	3	P.R.
21,433	18,322	12,929	12,445	13,199	TOTAL

U.S. Van and Light Truck Production 1984 vs. 1983

	Total Output 1984	Pct. of 1984 Output	Total Output 1983	Pct. of 1983 Output
CHEVROLET	968,709	32.30	848,570	38.24
Chevy Van/Sportvan	120,878	4.03	142,555	6.42
S-10	199,631	6.66	208,678	9.40
S-10 Blazer	150,599	5.02	112,366	5.06
Blazer	46,919	1.56	35,179	1.59
Astro	7,895	0.26		...
El Camino		...	28,322	1.28
Suburban	57,286	1.91	41,261	1.86
Pickups	332,404	11.09	280,209	12.63
P Models	53,097	1.77	(46,453)*	(2.09)
*—included in totals above.				
CHRYSLER	213,115	7.12	147,695	6.66
Ramcharger	34,604	1.15	25,678	1.16
Pickups	169,951	5.67	109,400	4.93
Rampage/Scamp	8,560	0.28	12,617	0.57
FORD	1,271,881	42.42	888,180	40.03
Bronco	53,772	1.80	131,203	5.91
Bronco II	109,107	3.65		...
Econoline/Club Wagon	240,927	8.03	208,717	9.40
Pickups	620,559	20.69	345,182	15.56
Ranger	247,516	8.25	203,078	9.16
GMC	268,202	8.94	239,074	10.77
Vandura/Rally Vans	25,944	0.87	24,966	1.13
S-15	51,732	1.73	51,336	2.31
S-15 Jimmy	41,720	1.39	29,274	1.32
Jimmy	9,278	0.31	8,426	0.38
Safari	2,124	0.07		...
Caballero	2,834	0.09	2,312	0.10
Suburban	26,065	0.87	23,468	1.06
Pickups	98,759	3.29	93,931	4.23
P Models	9,746	0.32	5,361	0.24
AMC-JEEP	176,276	5.87	75,534	3.40
Cherokee	93,363	3.11	6,816	0.28
CJ	45,363	1.51	40,758	1.84
Pickups	3,082	0.10	4,705	0.21
Wagoneer	11,944	0.40	18,478	0.83
Grand Wagoneer	20,019	0.67		...
Srambler	2,492	0.08	5,407	0.24
NISSAN	100,510	3.35	19,979	0.90
Pickups	100,510	3.35	19,979	0.90
TOTAL	2,998,643	100.00	2,219,032	100.00

Source: Reprinted by permission from *Automotive News*. Copyright 1985.